Enterprise Rent-A-Car

Functional Design Specification
Terminate Rental

Version 1.0

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Revision History

Date	Issue	Description	Author
April 20, 2000	0.1	Created Use Case and Screen Design	Brian Weingart, Debi Ealick and Johnny Sands
April 28, 2000	0.1	Linked Use Case and Screen Design subdocuments to master document	Cindy Bastean
May 3, 2000	0.2	Removed Subdocuments and formatted according to standards	Cindy Bastean
May 11, 2000	0.2	Changed screen design, and added to document	Debi Ealick
May 16, 2000	0.3	Revised according to cross team QA	Cindy Bastean
May 25, 2000	0.4	Added dropdown reason box to Terminate Rental Screen	Deb Ealick
May 25, 2000	0.4	Added 'Reason' to screen field section	Cindy Bastean
June 8, 2000	0.5	Added data field information	Cindy Bastean
July 3, 2000	0.6	Changed screen field and data field information per Zefer look & feel	Cindy Bastean
July 14, 2000	0.6	Updated Use Case and Screen Field sections	Brian Weingart, Debi Ealick, Johnny Sands, Brent Armbruster, Stan Schuchat, Mike Slater and Cindy Bastean
October 5, 2000	1.0	Updated Use Case and Screen Field sections based on feedback provided by management reviewers and the testing team.	Mike Slater

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Terminate Rental

1.   Terminate Rental Use Case

1.1   Brief Description

The Terminate Rental use case describes how the USER would terminate a rental. This use case will allow the USER to inform Enterprise of the last day that the ADJUSTER will pay for a rental. In most cases, by providing a date in the future, Enterprise will receive an extension through the last day.

1.2   Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** -- The USER will use this case to terminate a rental.

1.3   Pre-Conditions
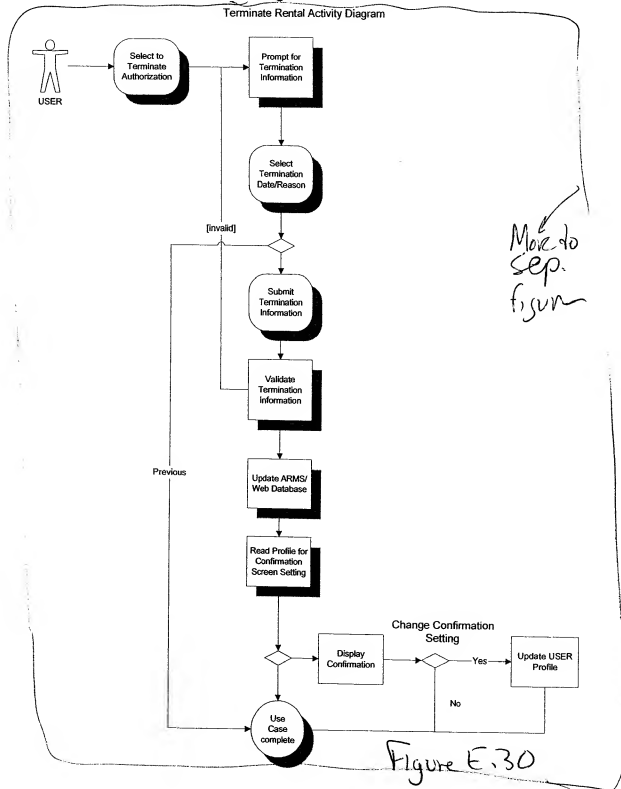
- The USER must be logged into the ARMS Web system.
- The USER must have the authority to terminate an open rental.
- The USER must have selected an authorized rental.

1.4   Flow of Events

The Flow of Events will include the necessary steps to terminate a rental.

1.4.1 Activity Diagram — see Figure E.30

Terminate Rental Activity Diagram

More to sep. figure

Figure E.30

1.4.2 Basic Flow

1. The USER selects to terminate an authorization.
2. The system prompts the USER for the termination information.
3. The USER enters the termination date and reason/comments.
4. The USER submits the termination information.
5. The system will validate the termination information.
6. The system updates the ARMS Web database.
7. The system reads the USER profile for the confirmation settings.
8. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Previous

After step 3, the USER can abandon all changes, which result in the system state remaining unchanged. After clicking the "Previous" button, the USER will be returned to the screen from which they came.

1.4.3.2 Additional Comments

When terminating a rental, the USER must select a reason from the drop-down box to explain why the termination is taking place. As well, if further explanation is desired there is a comment box in which the USER may enter additional comments for more clarification. This section is optional, unless the USER selects "Other" from the reason code drop-down box. In this case, the comment box must be used.

1.4.3.3 Display Confirmation

After step 7, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place. The confirmation page is completely optional; therefore, at anytime the USER wants to set their profile to bypass this screen, he/she may do so.

1.4.3.4 Update USER Profile

During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

1.5 Post-Conditions

- If the use case was successful then the changes will go into effect immediately and write a transaction record to pass to ARMS indicating that there was a change on the rental. If the renter's email address was entered, a system-generated message will notify the renter.
- If the use case was unsuccessful then the system will remain unchanged.

1.6   Special Requirements

1.6.1   The termination date must be greater than or equal to the current date or the last day authorized. There is a business rule that ensures that an adjuster cannot take away already used rental days.

Current Date	Authorization Date	Termination Date
6/20	6/25	>=6/20
6/20	6/10	>=6/10

1.6.2   If the USER extends an authorization that has been terminated, the termination information is considered invalid.

1.6.3   It is mandatory that a USER select a termination reason from the drop-down list. If the USER selects "Other" from the drop-down list, a comment about the termination must be supplied.

1.7   Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Terminate Rental *(see Figure E.31)*

This screen will allow the user enter the information about terminating a rental.

2.1.1 Screen Layout – Terminate Rental – *see Figure E.31*

Figure E.31

→ More
to
sep.
figure

2.1.2 Terminate Rental

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Comment:	Input	50	Message Text	NOTE	Required field if Reason selected is "Other"
Reason:	List Box	30	Reason	NOTE	Required Field
Termination Date	List Box	10	Termination Date	Termination Date	The date entered must be the current date or later. This is the date that the insurance company will no longer pay for the rental. / This field should have a calendar control associated with it to allow the user to select the date of loss from a calend
Renter:	Output	30	Renter's Name	First Name + Last Name	Renter's Last Name + Renter's First Name

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Previous

Will return the user to the detail screen from which they came. The system and the information on the detail screen will remain unchanged

2.1.3.2 Process

When clicked, the system will complete the termination of the rental and notify the required parties.

2.1.3.2.1   The user must have selected a valid termination date that is greater than the current date

3.   **Application Operations**

4.   Data Fields

4.1   Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1   Company Id

Entity	ARM: ARMS/400 Internal Error Log File
Column Name	E4CUID
Label Name	Company Id
System Name	
Data Type	CHAR(5)
Attribute Definition	

4.1.2   external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.3   external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencie

4.1.4   First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.5   First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	

Data Type	CHAR(15)
Attribute Definition	

4.1.6   Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.7   Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.8   Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.9   NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.10   renter email

Entity	RENTER EXTENSION
Column Name	rentr_eml
Label Name	renter email:
System Name	RENTREML
Data Type	CHAR(70)
Attribute Definition	The email address of the renter.

4.1.11   Termination Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZTMDT
Label Name	Termination Date

System Name	
Data Type	NUMERIC(8)
Attribute Definition	

5.   Questions and Answers

Issue Number: 373

Question: How is the renter currently notified of a termination of the rental? Are they usually notified by the time the rental is terminated? How should this be represented on the screen? Should the checkbox say to notify the renter or that the renter has already been notified?

Status: Pending

Resolution:

Enterprise Rent-A-Car

Functional Design Specification
Transfer File

Version 0.6

DRAFT

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Revision History

Date	Issue	Description	Author
April 25, 2000	0.1	Created Use Case and Screen Design	Mike Slater, Debi Ealick and Johnny Sands
May 3, 2000	0.1	Attached subdocuments to master document	Cindy Bastean
May 8, 2000	0.2	Removed Subdocuments and formatted according to standard	Cindy Bastean
May 8, 2000	0.3	Made changes according to final team review	Cindy Bastean
May 15, 2000	0.4	Added screens according to final team review	Debi Ealick
May 22, 2000	0.4	Incorporated changes discussed in cross team QA	Cindy Bastean
June 8, 2000	0.5	Added data field information	Cindy Bastean
July 5, 2000	0.6	Updated screen field and data field information	Cindy Bastean
July 13, 2000	0.6	Updated Use Case and Screen Design sections	Mike Slater, Debi Ealick Johnny Sands , Brian Weingart, Brent Armbruster and Cindy Bastean
October 6, 2000	1.0	Updated Use Case and Screen Design sections based on feedback provided by management reviewers and the testing team.	Mike Slater

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Transfer File

1. Transfer File Use Case

1.1 Brief Description

The Transfer File use case describes how the user would assign one of their action items to another user/office.

1.2 Use Case Actors

The following actors will interact with this use case. Each of the actors can be defined generically as USER. The USER will use this use case to reassign action items to other USERS and/or offices.

- **ADJUSTER**
- **PROCESSOR**

1.3 Pre-Conditions

- The USER must be logged into the ARMS Web system.
- The USER must have the ability to reassign action items.
- The USER must have access to a customer file to reassign.
- The customer file must be in an open, reservation, or unauthorized state.

1.4 Flow of Events

The Flow of Events will include the necessary steps for a USER to reassign action items.

1.4.1 Activity Diagram — see Figure E.32

Reassign User/Office Activity Diagram
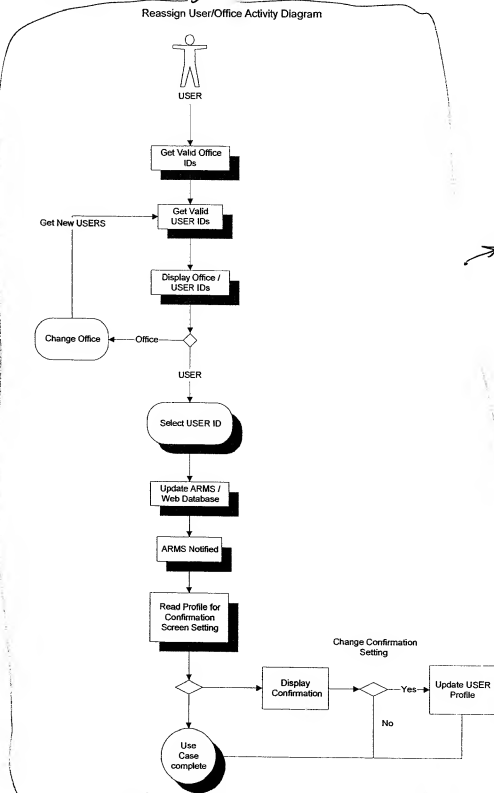
Figure E.32

1.4.2 Basic Flow

1. The USER selects to reassign a customer file.
2. The system retrieves the list of valid offices to display.
3. The system retrieves the list of valid USERs to display based on reservation/ticket status.
4. The system displays the list of adjusters for the current office and the list of other valid offices.
5. The USER selects the user that will be the new owner of the selected action item.
6. The system will update he ARMS Web database to reflect the recent ownership change and changes, if any, from the prior screen.
7. The system generates a message indicating that a transfer and any other changes have been completed.
8. The system updates the ARMS Web database and notifies ARMS with an Authorization Change transaction.
9. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Change Office

After step 3 of the basic flow, the USER may choose to assign the action item to a new office. If the USER chooses a new office, the flow would return to step 2 of the basic flow. This should reflect possible recipients of the action item from that office.

1.4.3.2 Cancel Use Case

The USER may cancel the use case at any point prior to updating the ARMS Web Database. If the USER elects to cancel the use case, the customer file will not be transferred, however, any other changes that were made to the file will remain.

1.4.3.3 Display Confirmation

After step 7, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place. The confirmation page is completely optional, therefore, at anytime the USER wants to set their profile to bypass this screen, he/she may do so.

1.4.3.4 Update USER Profile

During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

1.5 Post-Conditions

- If the use case was successful then the changes should go in to effect immediately and the new owner should be able to view the newly assigned action item.
- If the use case was unsuccessful then the system will remain unchanged.

1.6 Special Requirements

- When building the list of valid USERS, the system will determine the status of the reservation / ticket and retrieve all users in the current office with authority to process that status of a reservation / ticket.

- When building the list of valid Offices, the system will retrieve all other offices defined within ARMS Web as valid offices for the specified company.

- When selecting an office for the reassign operation, the system must rebuild the user list so the USER will only see valid users that are able to complete the action item to be transferred.

- After the changes have been submitted, the next Action Item will populate indicating that a transfer has been completed, if the USER started from the Action Item List.

- After the changes have been submitted, the USER will return to the profiled start page with a message indicating that a transfer has been completed, if the USER arrived at the customer file via the search option.

1.7   Extension Points

None

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Transfer File — (see Figure E.33)

This screen will allow the user to pick which functions that they may want to change.

2.1.1 Screen Layout – Transfer File → See Figure E.33

Transfer File

Any changes made to this file will be transferred when you process.

Adjuster currently handling this customer file:

    Claims Office: 001

Adjuster's Name: Fitzgerald, Neil

Select the adjuster you want to transfer this customer file to:

    Claims Office: 001

Adjuster's Name: Klopfenstein, Anita

More to def, fijun

2.1.2 Transfer File — Figure E.33

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Adjuster's Name	ListBox	30	Change to Adjuster's Name	First Name + Last Name	List of adjuster's within the currently selected Assign to Claim Office that are authorized to handle the current request type. The adjuster that the request is currently assigned to will be selected upon entry into the screen.
Adjuster's Name:	Output	30	Current Adjuster's Name	First Name + Last Name	N/A.
Claims Office	ListBox	3	Change to Office Id	external organization identifier	List of office within the current Company Structure that are authorized to handle the current request type. The office that the request is currently assigned to will be selected in the drop down box upon entry into the screen.
Claims Office:	Output	3	Current Office Id	external organization abbreviated name	N/A

2.1.3 Screen Function Definition

2.1.3.1 Cancel

When clicked, the USER will be returned to the screen/use case where they were prior to selecting Change Office/Adjuster (Transfer). Any changes made will be lost and the system will remain unchanged.

2.1.3.2 Process

When clicked, the changes made will be validated. If the validation passes, the update will be sent to the ARMS system and the USER will be returned to the screen/use case from which they came. If the validation fails, the USER will be returned to the current screen with error message(s) and the field in error highlighted

3.   **Application Operations**

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.2 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencie

4.1.3 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.4 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

Enterprise Rent-A-Car

Functional Design Specification
Cancel Authorization

Version 1.0

Last Saved: 10/9/00 3:34 PM

Revision History

Date	Issue	Description	Author
May 1, 2000	0.1	Created Use Case and Screen Design	Keith Baker, Debi Ealick and Johnny Sands
May 3, 2000	0.1	Attached subdocuments to master document	Cindy Bastean
May 8, 2000	0.2	Removed subdocuments and formatted according to standards	Cindy Bastean
May 8, 2000	0.3	Made changes according to final team review	Cindy Bastean
May 22, 2000	0.4	Incorporated changes discussed in Cross Team QA	Cindy Bastean
May 25, 2000	0.4	Updated Screens and Fields	Debi Ealick
June 8, 2000	0.5	Added Data Field Information	Cindy Bastean
July 5, 2000	0.6	Updated screen field and data field information	Cindy Bastean
July 14, 2000	0.6	Updated Use Case and Screen Design sections	Brian Weingart, Mike Slater, Debi Ealick, Johnny Sands, Brent Armbruster, Stanley Schuchat and Cindy Bastean
October 9, 2000	1.0	Updated Use Case and Screen Design sections based on feedback provided by management reviewers and the testing team.	Mike Slater

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Cancel Authorization

1. Cancel Authorization Use Case

1.1 Brief Description

This use case will describe how a USER would cancel an authorized reservation.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The USER will be able to perform the duties of canceling an authorized reservation.

1.3 Pre-Conditions

- The USER must be logged into the ARMS Web system.
- The USER must have the ability to cancel an authorization.
- The USER has selected an authorized reservation and wants to cancel the authorization within ARMS Web.

1.4 Flow of Events

The Flow of Events will include the necessary steps to "Cancel Authorization".

1.4.1 Activity Diagram ~ see Figure E.34

Cancel Authorization Activity Diagram

Figure E.34
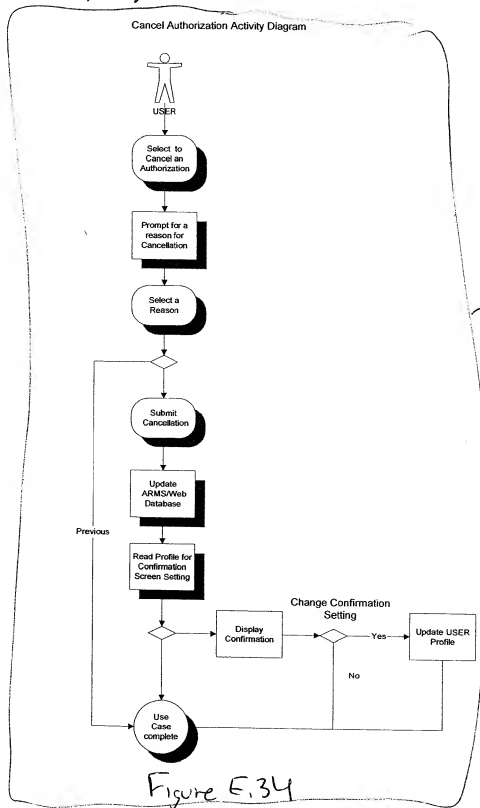
1.4.2   Basic Flow

1. The USER selects to cancel the authorization.
2. The system will prompt the user for a reason for cancellation.
3. The USER will select a reason.
4. The USER will submit the cancellation.
5. The system will update the ARMS Web database to reflect that the USER cancelled the Authorization.
6. The system will read the USER profile for the confirmation settings.
7. This ends the use case.

1.4.3   Alternative Flows

1.4.3.1   Previous

After step 3, the USER can abandon all changes, which result in the system state remaining unchanged. After clicking the "Previous" button, the USER will be returned to the screen from which they came.

1.4.3.2   Additional Comments

When canceling a rental, the USER must select a reason from the drop-down box to explain why the cancellation is taking place. As well, if further explanation is desired, there is a comment box in which the USER may enter additional comments for more clarification. This section is optional, unless the USER selects "Other" from the reason code drop-down box. In this case, the comment box must be used.

1.4.3.3   Display Confirmation

After step 6, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place. The confirmation page is completely optional, therefore, at anytime the USER wants to set their profile to bypass this screen, he/she may do so.

1.4.3.4   Update USER Profile

During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

1.5   Post-Conditions

*   If the use case was successful then the changes should go in to effect immediately and generate a transaction record to pass to ARMS indicating that the authorized reservation was cancelled.
*   If the use case was unsuccessful then the system will remain unchanged.

1.6   Special Requirements

*   When canceling an authorization, the USER must select a reason from the drop-down list. If the USER chooses "Other" from the pre-defined list, a comment about why the authorization was cancelled must be supplied.

1.7   Extension Points

None

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Cancel Direct Bill Authorization   _(see Figure E.34)_

This screen will allow the user to pick which functions that he/she may want to change.

2.1.1 Screen Layout – Cancel Direct Bill Authorization   _– see Figure E.34_

Figure E.35

(handwritten note: More to sep. figure)

2.1.2 Cancel Direct Bill Authorization

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Reason	List Box	50	Cancellation Reason	NOTE	N/A
Comment:	Input	50	Message Text	NOTE	Required if cancellation reason is "Other"
Claim #	Output	30	Claim Number	Insurance Claim Number	
Renter's Name	Output	30	Renter's Name	First Name + Last Name	N/A

2.1.3   Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Previous

When clicked, the user will be returned to the screen/use case where they were prior to selecting Cancel Reservation. Any changes made will be lost and the system will remain unchanged.

2.1.3.2 Process

When clicked, system will update the message file with the comment record if entered and mark the current reservation authorization as cancel. The cancellation and the new message, if entered, will be forwarded to the ARMS system. The system returns the USER to the appropriate Action Items List screen.

3. Application Operations

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1 Cancel Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZCNDT
Label Name	Cancel Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.2 Cancellation Code

Entity	ARM: Authorization(Claim Info)
Column Name	AZCNCD
Label Name	Cancellation Code
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.3 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.4 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.5 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.6   Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.7   NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.8   Rental Location

Entity	ARM: Authorization(Claim Info)
Column Name	AZRNLC
Label Name	Rental Location
System Name	
Data Type	CHAR(10)
Attribute Definition	

5. Questions and Answers

Issue Number: 418

Question: Do we need a reason to cancel - have cancel page.

Status: Closed - Resolved

Resolution: 6-23-00, Per Neil, kill this page, it's not necessary.

Enterprise Rent-A-Car

**Functional Design Specification
View Customer File**

Version 1.0

Last Saved: 10/3/00 2:05 PM

Revision History

Date	Issue	Description	Author
May 23, 2000	0.1	Initial Draft	Michael Slater, Deb Ealick, Johnny Sands
May 24, 2000	0.2	Removed subdocuments for final review	Cindy Bastean
May 24, 2000	0.3	Incorporate changes per final team review	Cindy Bastean
May 31, 2000	0.4	Incorporated changes per cross team QA; Added Screen Design	Cindy Bastean; Debi Ealick
June 8, 2000	0.5	Add data field information	Cindy Bastean
July 5, 2000	0.6	Updated screen field and data field information	Cindy Bastean
July 14, 2000	0.6	Updated Use Case and Screen Design Sections	Michael Slater, Deb Ealick, Johnny Sands, Brian Weingart, Brent Armbruster, Stan Schuchat and Cindy Bastean
October 3, 2000	1.0	Updated Use Case and Screen Design Sections	Michael Slater

ARMS Redesign Project - Release 1.0

Issue: 0.6 **Error!**
**Reference source not
found.**

View Customer File

Issue Date: 10/20/00

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ARMS Redesign Project - Release 1.0   Issue: 0.6 Error!
                                              Reference source not
                                              found.

View Customer File   Issue Date: 10/20/00

ARMS Redesign Project - Release 1.0

View Customer File

Issue: 0.6 **Error! Reference source not found.**

Issue Date: 10/20/00

View Customer File

1. Search and View Customer File

1.1 Brief Description

This use case describes the process that a USER would use to find and view information regarding a rental. In order to view the rental detail, one of two general conditions must be satisfied:

1) The rental is open and the USER does not have any authority to make changes

2) The rental is in a state that no longer allows changes to be made.

If these conditions are not met, the USER will be taken to the appropriate use case.

1.2 Use Case Actors

All actors will use the use case to View Rental Detail in the ARMS Web system. All of the following actors can be defined generically as a USER:

- **ADJUSTER**
- **PROCESSOR**
- **COMPANY MANAGER**
- **ENTERPRISE ADMINISTRATOR**
- **COMPANY ADMINISTRATOR**

1.3 Pre-Conditions

- The USER must be signed-on to the system
  (AND)
- The USER does not have the authority to make changes and the ticket is open,
  (OR)
- The ticket is in a state that doesn't allow changes to be made.

1.4 Flow of Events

The Flow of Events includes all the steps necessary to View Rental Detail in the ARMS Web system.

ARMS Redesign Project – Release 1.0

View Customer File

Issue: 0.6 **Error! Reference source not found.**

Issue Date: 10/2000

1.4.1   *Activity Diagram* — see Figure E.36

ARMS Redesign Project - Release 1.0

View Customer File

Issue: 0.0 Error!
Reference source not found.
Issue Date: 10/20/00

View Customer File Activity Diagram

Figure E.36

ARMS Redesign Project - Release 1.0

View Customer File

Issue: 0.0   Error!
Reference source not
found.
Issue Date: 10/20/00
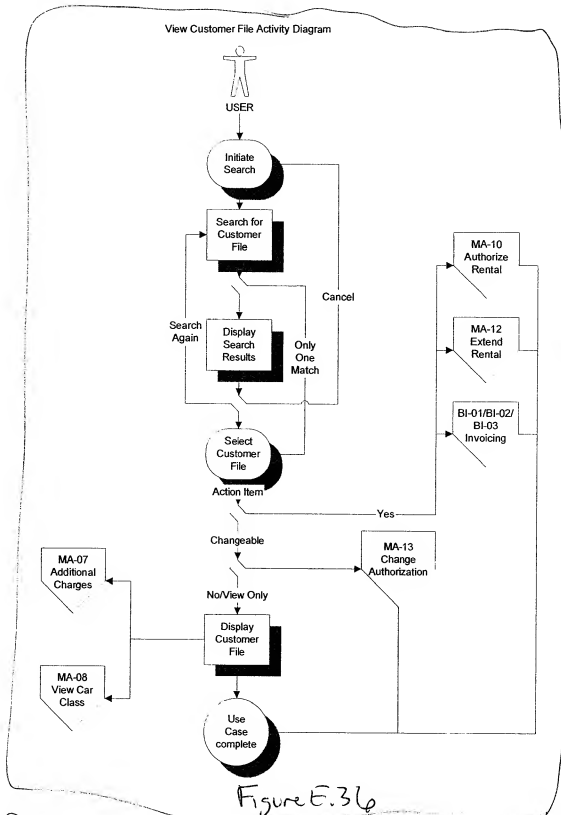
1.4.2   Basic Flow

The **Basic Flow** of the View Rental Detail use case includes all of the required activities for the USER to successfully find and view information regarding an open rental.

1.   The USER initiates a search for a Customer File.

2.   The system, based on criteria entered by the USER, retrieves the matches for that search.

3.   The system displays the search results.

4.   The USER selects one of the matches.

5.   The system displays the detail of the Customer File.

6.   This ends this use case.

1.4.3   Alternative Flows

1.4.3.1   Search Again

After step 3 of the basic flow, the USER may decide that they would like to conduct another search. By entering new search criteria, they would return to step 2 with new criteria and the use case could continue.

1.4.3.2   Only One Match Found

At step 2 of the basic flow, if the system only finds one match, the system will advance to step 5 of the basic flow invoking the appropriate use case for modifications.

1.4.3.3   View Only

If the Customer File selected was in a state not allowing changes, the system would display the Customer File, however, not allowing the USER to modify any information within ARMS Web.

1.5   Post-Conditions

- If the use case is successful, the system will return to its previous state.
- If the use case is unsuccessful, the use case the system will remain unchanged.

1.6   Special Requirements

To successfully locate a customer file, the following criteria must be satisfied:

1.   The following fields will limit the search results: Adjuster Name, Last Authorized Day, Date of Loss, and/or a status of the Customer File.

   a.   If a Renter Last Name has been supplied, an exact match on last name is considered valid

   b.   If a Renter Last Name and Renter First Name has been supplied and there is no exact match on Renter Last Name, there is no match.

   c.   If a Renter Last Name and Renter First Name has been supplied and there is an exact match on Renter Last Name and not an exact match on Renter First Name, the Renter Last Name with the closest Renter First Name is considered a match.

    d. If a Renter Last Name and Claim Number has been supplied and there is an exact match on Renter Last Name and not on Claim Number, the closest match on Renter Last Name and the closest match on Claim Number greater than the Claim Number provided is considered a match.

2. If the USER supplies one or more of the following fields, the above result set will position to closest match of Customer Files based on: Renter Last Name, Renter First Name, and/or Claim Number.

3. This search capability will include all available Open and Closed Rentals for searching.

4. Any empty fields signify the search should not limit the result set by that field.

5. Any Customer File present in the result set will contain a link to the appropriate use case based on the current status of the reservation or rental.

1.7 Extension Points

1.7.1.1 *MA-10 Authorized a Request*

If the customer file were an unauthorized reservation or ticket, the system would enter the Authorization use case to allow the USER to authorize this Customer File.

1.7.1.2 *MA-12 Extend Rental*

If the customer file were an authorized ticket or an action item of extension status, the system would enter the Extend Rental use case to allow the USER to extend this Customer File.

1.7.1.3 *MA-13 Change Authorization*

If the customer file were an authorized reservation or ticket not requiring any immediate action, the system would enter the Change Authorization use case to allow the USER to authorize this Customer File.

1.7.1.4 *MA-07 Additional Charges*

The Additional Charges use case will be used to add special charges to the reservation being created by the USER (e.g., CDW). Any Additional Charges captured should be returned and applied to the reservation. The existence of Additional Charges should be reflected on the reservation screen.

1.7.1.5 *MA-08 View Car Class*

The View Car Class use case will be used to allow the USER to view details about and select a car class to apply to a reservation. Details will include the average number of passengers and luggage items that can be served by a vehicle in the specific car class. The car class selected by the USER should be applied to the reservation.

1.7.1.6 *Invoicing – BI-01-Handle Unapproved Invoices & BI-02-Pay Approved Invoices & BI-03 Reject an Invoice*

At step 5, the USER may elect to view approved invoices, unapproved invoices, or rejected invoices. Upon completion of this process, the USER should be returned back to step 5 of the Basic Flow.

ARMS Redesign Project - Release 1.0

Issue: 0.6 **Error!**
Reference source not
found.

View Customer File

Issue Date: 10/20/00

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Find a Customer (tab)

This screen will allow the USER to view the rental.

2.1.1 *Find a Customer (tab)* — see Figure E.37

Figure E.37

↳ Move to
sep. figure

ARMS Redesign Project - Release 1.0

Issue: 0.6 Error! Reference source not found.

Issue Date: 10/20/00

View Customer File

2.1.2 Customer (tab)

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
last name	Input	20	Renter last name	Last name	
first name	Input	20	Renter's first name	First name	
claim number	input	30	Insurance claim number	Ins. Claim number	N/A.
adj. last name	Input	20	Adjuster's last name	Last name	N/A.
last date authorized:	Input	20	Last date authorized	LAST AUTH DAY	N/A.
status:	List Box	20	Contract Status	Status Code	N/A.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Search

When clicked, the will search for any records that match the criteria listed.

2.2 Customer File - Closed Items

This screen will allow the USER to view the rental when closed.

2.2.1 Screen Layout – Customer File - Closed Items – see Figure E.38

ARMS Redesign Project — Release 1.0

View Customer File

Issue: 0.6 Error!
Reference source not found.
Issue Date: 10/20/00

Welcome to the
Automated Rental Management System

create a   find a
RESERVATION   CUSTOMER

Claims Office: 001   Handling for: Yourself

Customer File: CLOSED for Bowie, David   Claim No. 323232323232

Go to Invoice

RENTER INFORMATION:
Bowie, David
1735 N. Paulina St.
Chicago, IL 60622
Renter Type: Claimant

Home: (773) 564-6054
Work: (773) 395-6200
Email: dbowie@zefer.com
Requested email confirmation

RENTAL INFORMATION:
Authorized Rental:
Authorized Class: Standard
Days/Rate: 3 days @ $21.99/day
Current Class: Full-Size

Rental Date: 03/28/2000
Start Date: 03/30/2000

Enterprise Rent-A-Car Location:
Enterprise Edgewater Branch
5400 N. Ashland
Chicago, IL 60622
773-334-5400

CLAIM INFORMATION:
Claim Number: 323232323232323
Insured Name: Lalumandier, Craig
Owner's vehicle: GMC Suburban 1999
Date of Loss: 03/28/2000
Vehicle Condition: Non-Drivable

Repair Facility:
Elco Chevrolet
Chicago, IL 60621
(773)334-9832

NOTEBOOK:
Invoice Paid: 536.13 on 6/20/00
Message, Belanger, Hughes, 2/20/00
Note from Enterprise, Sarussi, Marty, 2/21/00
Extension Request, 2/24/00
Extension, 2/25/00

⚙ top of page

Invoicing: ▓▓▓▓▓▓▓ ☐ Print Rental History too

[Use the "Print" button from your browser after clicking the "Printer-Friendly Version" button.]

RENTAL:
Enterprise Rent-A-Car Location:
6850 Ladue Rd.
Saint Louis, MO 631240001
(314) 5120294

INVOICE:
Reference: PPGM-D073002
Invoice Date: 02/10/00
Federal ID: 4800791835

Authorized
Authorized Period: 02/10/00 to 03/01/00 (20 days)
Days   20
Rate   22.99
Direct Bill Percent   100%
Total authorized: 459.8 Plus Tax & Surcharges

CLAIM:
Renter: Weber, Andrew
Claim Number: 5698754821
Claim Type: Claimant
Vehicle Condition: Non-Driveable
Date of Loss: 02/05/00
Insured Name: Smith, Bob

Actual Rental
Rental Period: 02/10/00 to 03/01/00 (20 days)
Billed Period: 02/10/00 to 03/01/00 (20 days)
Actual Days:
   20 @ $22.99/day = $505.78
Direct Bill Percent   100%
Sales Tax (6%) = $30.35
Total Charges: $536.13
Amount Received: $0.00
 Total Due: $536.13

⚙ top of page

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Figure E.38

More
Jo
top.
figure

ARMS Redesign Project - Release 1.0   Issue: 0.6 **Error! Reference source not found.**

View Customer File   Issue Date: 10/20/00

2.2.2 Customer File - Closed Items

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Actual Days:	Output	3	actual days rented	Item Quantity	Invoicing Section Only
@	Output	3	Actual Rate Rented	Item Rate	Invoicing Section - Actual Rental only
=	Output	8	Amount charged	Item Amount	Invoicing sections, Actual Rental only
Billed Period: _____ to _____ (__days)	Output	30	Billing start date, end date and number of days	Item Quantity	Invoicing section only
	Output	3	Number of days authorized	Item Quantity	Invoicing, Actual Rental Section only
Sales Tax (__%)	Output	3	Sales Tax	Item Description	Invoicing, Actual Rental section only
Billed Period: _____ to _____ (__days)	Output	30	Billing start date, end date and number of days	Bill to End Date	Invoicing section only
Billed Period: _____ to _____ (__days)	Output	30	Billing start date, end date and number of days	Bill to Start Date	Invoicing section only
Federal ID:	Output	12	Federal ID Number	Federal ID Number	Only shown in Invoicing sections
Invoice Date:	Output	10	Invoice Date	Record Add Date	Only used in the invoice sections
Reference:	Output	32	Reference Number	Invoice Number	Only in the invoice sections
Amount Received	Output	8	Amount Received	Total Amount Received	Invoicing, Actual Rental only
Total Charges:	Output	8	Total Charges	Total Ticket Charges	Invoicing, Actual Rental Section only
Total Due:	Output	8	Total Due	Total Amount Due	Invoicing, Actual Rental sections only
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	
Authorized Period: _____ to _____ (____ days)	Output	30	Authorized Start Date	Start Date + End Date + Days authorized-detail	Only in invoicing sections
Date	Output	8	Message Creation Date	Add Date	N/A.
Message to Branch Location:	Output	50	Message Text	NOTE	
Notebook	Output	50	Message Text	NOTE	N/A.
Authorized Class:	Output	20	Car Class Name	Vehicle Class	
Current Class:	Output	20	Car Class Name	Vehicle Class	N/A.
Claim Number:	Output	11	Claim Number	Insurance Claim Number	
Claim No.	Output	30	Claim Number	Insurance Claim Number	
Daily Rate/Max. Dollars	Output	10	Daily Policy Rate and Maximum Policy Rate	Dollars Per Day Covered + Max $ Covered	Invoicing section only
Direct Bill Percent	Output	4	Direct Bill Percent	Bill To %	Invoicing sections only
Direct Bill Percent	Output	8	Direct Bill Percent	Bill To %	Invoicing sections Actual Rental only
	Output	30	Rental Location Branch Name	Rental Location	
Days/Rate	Output	6	Rental Location Rate and number of days	Number Of Days Authorized	N/A.

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Issue: 0.6 **Error! Reference source not found.**

View Customer File

Issue Date: 10/20/00

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Days/Rate	Output	6	Rental Location Rate and number of days	Vehicle Rate	N/A.
@	Output	7	Rental Rate per day	Rate Charged	Invoicing section only
Rental Period: ___ to ___ (___ days)	Output	30	Rental Start	Start Date + End Date + CALCULATED	Invoicing sections only
Rental Date	Output	10	Rental Start Date	Start Date	
Start Date	Output	10	Start Date of rental	Start Date	
Insured Name:	Output	30	Insured's Name	First Name + Last Name	
	Output	30	Rental Location Address	Address Line + Address Line2	N/A.
	Output	25	Rental Location City Name	City	N/A.
	Output	10	Rental Location Postal / Zip Code	Zip Code	N/A.
	Output	3	Rental Location State / Province Code	State	N/A.
	Output	13	Rental Location Telephone Number	Telephone Number	N/A.
Date of Loss:	Output	10	Date of Loss	Date Of Loss	
	Output	20	Renter City Name	City	
	Output	10	Renter Postal / Zip Code	Zip Code	
	Output	3	Renter State / Province Code	State	
	Output	30	Renter Street Address	Address Line	
Renter Email:	Output	20	Renter's Email	Day Phone	
Home Phone:	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extensin	
Renter Infomation:	Output	30	Renter's Name	First Name + Last Name	N/A.
Renter Name:	Output	30	Renter's Name	First Name + Last Name	
Owner's Vehicle	Output	4	Renter's Vehicle Year, Make and Model	Renter Vehicle Year + Renter Make/Model	
Work Phone:	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	
Repair Facility:	Output	20	Body Shop Name	Repair Facility Name	
Phone Number:	Output	16	Body Shop Phone Number	Telephone Number	
	Output	20	Repair Faciity City	City	
	Output	3	Repair Facility State	State	
	Output	7	Repair Facility Zip Code	Zip Code	
=	Output	10	Amount charged	CALCULATED	Invoicing sections only

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View Customer File

Issue: 0.6 Error!
Reference source not
found.

Issue Date: 10/20/00

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Total authorized Includes Tax & Surcharge	Output	8	Total authorized amount	CALCULATED	Invoicing sections only
Renter Type	Output	15	Claim Type	claim type description	
Claims Office:	Output	3	Office Id	external organization abbreviated name	
Vehicle Condition	Output	15	Loss Type	loss type description	
Renter Email:	Output	20	Renter's Email	renter email	

2.2.3   Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 Previous

When clicked, the USER will be taken back to the use case from where they came

2.2.3.2 Printer Friendly Version

When clicked, the system will bring up a screen that only shows the particular invoice for which you clicked this button. The USER may print from this screen

2.2.3.3 Top of page

When clicked, the USER will be taken to the top of the current page.

2.3   **Search Results**

This screen will allow the USER to view the rental when closed.

2.3.1   Screen Layout – Search Results – see Figure E.39

ARMS Redesign Project - Release 1.0

View Customer File

Issue: 0.6 Error!
Reference source not found

Issue Date: 10/20/00

Welcome to the
Automated Rental Management System

create a
RESERVATION   find a
CUSTOMER

Claims Office: 001   Handling for: Yourself

**There was more than one possible match for the items you searched for.
Please choose from the results below or Search Again**

Search Results:
You requested a search for: Abrahm, Alice
Adjuster Name: Summer

Items Searched: All Files

Renter's Name	Claim Number	File Type	Loss Date	Last Date Authorized

Would you like another search?

Last Name: Abrahm
First Name: Alice
Claim Number:
Confirmation Number:
Adjuster Last Name: Summer
Last Date Authorized: January 1 2000
Status: Closed

*Move
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sep.
figur* ←

● top of page

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Figure E.39

ARMS Redesign Project - Release 1.0

View Customer File

Issue: 0.6 Error! Reference source not found.

Issue Date: 10/20/00

2.3.2 Search Results

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Last Date	Output	10	Authorization Date		
Status	List Box	10	Contract Status	Status Code	
last date authorized	Input	5	Last Day Authorized	LAST AUT DAY	
adj. last name	Input	15	Adjuster Last Name	Last Name	
Adjuster Name:	Output	20	Adjuster Name	First Nam + Last Name	
Handling for:	List Box	15	Handling for Adjuster Name	First Name + Last Name	
File Type	Output	15	Status	Status Description	
confirmation number	Input	52	Confirmation Number	Transmission Code	
Claim Number	Output	30	Claim Number	Insurance Claim Number	Populated by the data matching the search criteria
claim number	Input	30	claim number	Insurance Claim Number	
Loss Date	Output	10	Date of Loss	Date Of Loss	
first name	Input	15	Renter's First Name	First Name	
last name	Input	15	Renter's Last Name	Last Name	
Renter's Name	Output	30	Renter's Name	First Name + Last Name	Returned data from the search criteria
Claims Office:	List Box	5	Office ID	external organization abbreviated name	
You requested a search for:	Output	30	Search Criteria	NOT STORED	This field will be populated by the criteria used to search for a particular record. This field may be a Last Name, First Name, Claim Numer, Confirmation Number, Adjuster Last Name or Status. The data in this fiel

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity

2.3.3.1 Search Again

When clicked, the system will re-search the database after the USER has entered new or additional criteria.

2.3.3.2 Top of page

When clicked, the USER will be taken to the top of the current page.

2.3.3.3 *View Next 10>>>*

> When clicked, the system will display the next 10 items that match the search criteria

3.   **Application Operations**

ARMS Redesign Project - Release 1.0

View Customer File

Issue: 0.6 Error!
Reference source not
found.

Issue Date: 10/20/00

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1 Add Date

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NEADDT
Label Name	Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.2 Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.3 Address Line

Entity	ARM: Renter Detail
Column Name	RKADL1
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.4 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.5 Bill To %

Entity	ARM: Authorization(Claim Info)
Column Name	AZBTPC
Label Name	Bill To %
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

ARMS Redesign Project - Release 1.0

Issue: 0.6 **Error! Reference source not found.**

View Customer File

Issue Date: 10/20/00

4.1.6 Bill to End Date

Entity	A4 Invoice Header
Column Name	I1BTDT
Label Name	Bill to End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.7 Bill to Start Date

Entity	A4 Invoice Header
Column Name	I1SRDT
Label Name	Bill to Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.8 Branch

Entity	ARM: Rental Location Master
Column Name	Branch
Label Name	Branch:
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.9 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.10 City

Entity	ARM: Renter Detail
Column Name	RKCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.11 City

Entity	ARM: Repair Detail
Column Name	RUCYNM
Label Name	City
System Name	
Data Type	CHAR(20)

ARMS Redesign Project - Release 1.0

View Customer File

Issue: 0.6 **Error! Reference source not found.**

Issue Date: 10/20/00

Attribute Definition	

4.1.12 claim type code

Entity	AUTHORIZATION EXTENSION
Column Name	clm_typ_cde
Label Name	claim type code:
System Name	CLMTYPCDE
Data Type	DEC(3,0)
Attribute Definition	The claim type code defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.13 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.14 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.15 Date Of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date Of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.16 Day Phone

Entity	ARM: Renter Detail
Column Name	RKDYPH
Label Name	Day Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

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View Customer File

Issue: 0.6 Error!
Reference source not
found.

Issue Date: 10/20/00

4.1.17 Days authorized-detail

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NEAUDY
Label Name	Days authorized-detail
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.18 Dollars Per Day Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ$PDY
Label Name	Dollars Per Day Covered
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.19 End Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZENDT
Label Name	End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.20 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencie

4.1.21 Federal ID Number

Entity	A4 Invoice Header
Column Name	I1FETX
Label Name	Federal ID Number
System Name	
Data Type	CHAR(15)
Attribute Definition	

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View Customer File

Issue: 0.6 **Error! Reference source not found.**

Issue Date: 10/20/00

4.1.22 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.23 First Name

Entity	ARM: Insured Detail
Column Name	IRFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.24 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.25 Group

Entity	ARM: Rental Location Master
Column Name	Group
Label Name	Group Number
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.26 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.27 Invoice Number

Entity	A4 Invoice Header
Column Name	IIINNO
Label Name	Invoice Number
System Name	
Data Type	CHAR(20)

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Issue: 0.6 Error!
Reference source not
found.

View Customer File

Issue Date: 10/20/00

Attribute Definition	

4.1.28 LAST AUT DAY

Entity	A4 Cross Reference
Column Name	X4LADT
Label Name	LAST AUT DAY
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.29 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.30 Last Name

Entity	ARM: Insured Detail
Column Name	IRLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.31 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.32 loss type code

Entity	AUTHORIZATION EXTENSION
Column Name	loss_typ_cde
Label Name	loss type code:
System Name	LOSSTYPCDE
Data Type	DEC(3,0)
Attribute Definition	The loss type code defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.33 loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.34 Max $ Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ$MAX
Label Name	Max $ Covered
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.35 message ecars indicator

Entity	AUTHORIZATION MESSAGE
Column Name	msg_ecars_ind
Label Name	message ecars indicator:
System Name	MSGECARIND
Data Type	CHAR(1)
Attribute Definition	The message ecars indicator indicates whether the message is sent/received from the ecars system.

4.1.36 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.37 Number Of Days Authorized

Entity	ARM: Authorization(Claim Info)
Column Name	AZAUDY
Label Name	Number Of Days Authorized
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.38 Rate Charged

Entity	ARM: Authorization(Claim Info)

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Issue: 0.6 Error! Reference source not found.

View Customer File

Issue Date: 10/20/00

Column Name	AZRTCH
Label Name	Rate Charged
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.39 Record Add Date

Entity	A4 Invoice Header
Column Name	I1ADDT
Label Name	Record Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.40 Rental Location

Entity	ARM: Authorization(Claim Info)
Column Name	AZRNLC
Label Name	Rental Location
System Name	
Data Type	CHAR(10)
Attribute Definition	

4.1.41 renter email

Entity	RENTER EXTENSION
Column Name	rentr_eml
Label Name	renter email:
System Name	RENTREML
Data Type	CHAR(70)
Attribute Definition	The email address of the renter.

4.1.42 Renter Make/Model

Entity	ARM: Renter Detail
Column Name	RKVHMM
Label Name	Renter Make/Model
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.43 Renter Vehicle Year

Entity	ARM: Renter Detail
Column Name	RKVHYR
Label Name	Renter Vehicle Year
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

ARMS Redesign Project - Release 1.0

View Customer File

Issue: 0.6 Error!
Reference source not found.
Issue Date: 10/20/00

4.1.44 Renters Day Phone Extension

Entity	ARM: Renter Detail
Column Name	RKDYEX
Label Name	Renters Day Phone Extension
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.45 Renters Night Phone

Entity	ARM: Renter Detail
Column Name	RKNTPH
Label Name	Renters Night Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.46 Renters Night Phone Extensin

Entity	ARM: Renter Detail
Column Name	RKNTEX
Label Name	Renters Night Phone Extensin
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.47 Repair Facility Name

Entity	ARM: Repair Detail
Column Name	RURFNM
Label Name	Repair Facility Name
System Name	
Data Type	CHAR(35)
Attribute Definition	

4.1.48 standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC
Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"

4.1.49 Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT

ARMS Redesign Project - Release 1.0

View Customer File

Issue: 0.6 Error!
Reference source not
found.
Issue Date: 10/20/00

Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.50 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.51 State

Entity	ARM: Renter Detail
Column Name	RKSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.52 State

Entity	ARM: Repair Detail
Column Name	RUSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.53 Status Description

Entity	ARM: ARMS/400 Cross Reference Status Table File
Column Name	XUSTDS
Label Name	Status Description
System Name	
Data Type	CHAR(6)
Attribute Definition	

4.1.54 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

ARMS Redesign Project - Release 1.0

View Customer File

Issue: 0.6 **Error!**
Reference source not
found.
Issue Date: 10/20/00

4.1.55 Telephone Number

Entity	ARM: Repair Detail
Column Name	RUPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.56 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL$$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.57 Total Amount Received

Entity	A4 Invoice Trailer
Column Name	I3RC$$
Label Name	Total Amount Received
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.58 Total Ticket Charges

Entity	A4 Invoice Trailer
Column Name	I3TO$$
Label Name	Total Ticket Charges
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.59 Transmission Code

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NETRCD
Label Name	Transmission Code
System Name	
Data Type	CHAR(1)
Attribute Definition	

4.1.60 Vehicle Class

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHCS
Label Name	Vehicle Class
System Name	
Data Type	CHAR(2)

ARMS Redesign Project - Release 1.0

View Customer File

Issue: 0.6 Error.
Reference source not
found.
Issue Date: 10/20/00

Attribute Definition	

4.1.61 Vehicle Rate

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHRT
Label Name	Vehicle Rate
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.62 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

4.1.63 Zip Code

Entity	ARM: Renter Detail
Column Name	RKZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

4.1.64 Zip Code

Entity	ARM: Repair Detail
Column Name	RUZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

Enterprise Rent-A-Car

**Functional Design Specification
Handle Unapproved Invoices**

Version 1.1

Last Saved: 8/14/00 1:20 PM

Revision History

Date	Issue	Description	Author
April 19, 2000	0.1	Initial Creation of Section 1.0	Brad Reel
April 24, 2000	0.2	Changes to reflect initial team review	Brad Reel
May 9, 2000	0.3	Included all subdocuments	Cindy Bastean
May 9, 2000	0.3	Added changes from Final Team Review, Removed subdocuments	Brad Reel, Deb Ealick, Anil Kabra, Cindy Bastean
June 9, 2000	1.0	Added data field information	Cindy Bastean
June 12, 2000	1.0	Made the following Changes: • Redefined the process based on iteration one feedback. • Removed invoice printing as part of the Basic Flow and added it to the Alternate Flows • Detailed the Bulk Payment Reconciliation Process • Added Alternate Flow to handle when the number of invoices on the Payment List exceeds the number that can be bulk-paid by the user's system.	Brad Reel
June 13, 2000	1.1	Removed reconciliation process from the specification. Reconciliation was deemed too complex to incorporate into the application at this time.	Brad Reel
June 29, 2000	1.1	Updated screen field and data field information	Cindy Bastean
June 29, 2000	1.1	Updated information throughout sections 1 & 2.	Brad Reel
September 15, 2000	1.1	Updated information throughout sections	Brian Weingart

Table of Contents
Handle Unapproved Invoices

1. Handle Unapproved Invoices Use Case

1.1 Brief Description

The Handle Unapproved Invoices use case describes how the Adjuster would review invoices and approve them for payment. The use case will then describe the processes the Adjuster will follow in the case where the Adjuster is the one that is actually paying the invoice.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use this case to approve and either pay unapproved invoices or send them on to a PROCESSOR for payment.

1.3 Pre-Conditions

- The ADJUSTER must be logged into the ARMS Web system.
- The ADJUSTER'S office must be set up for individual approval of invoices.
- The ADJUSTER must be able to handle invoices.

1.4 Flow of Events

The Flow of Events will include the necessary steps for an ADJUSTER to approve and pay invoices.

1.4.1   Activity Diagram - see Figure E.40

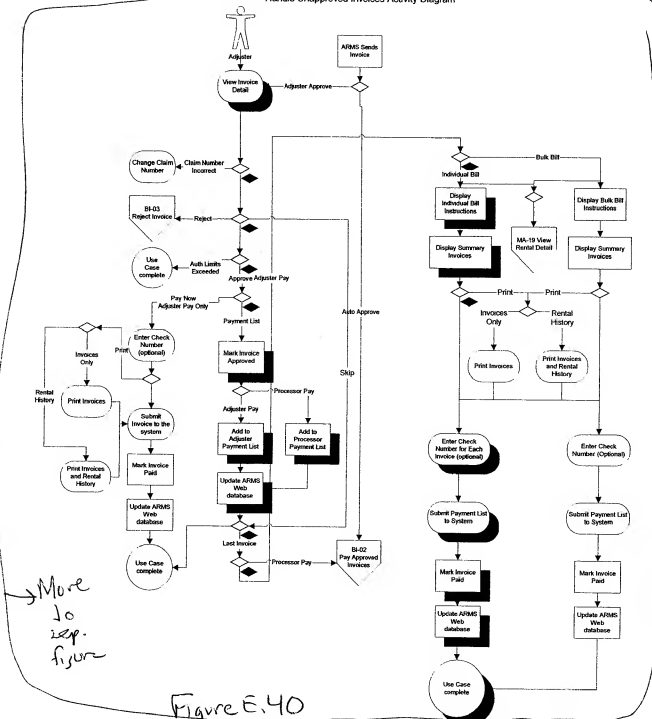Handle Unapproved Invoices Activity Diagram

More
to
rep.
figure

Figure E.40

1.4.2 Basic Flow

1. The ADJUSTER will view the detail of the invoice.
2. If the ADJUSTER chooses to pay the invoice immediately, execute subflow 1.4.2.3 – Pay a Single Invoice. Otherwise continue the Basic Flow.
3. The ADJUSTER will approve the invoice.
4. The system will mark the invoice approved.
5. If the ADJUSTER pays their invoices, then the invoice will be added to their payment list. If a PROCESSOR pays their invoices, then the invoice will be added to the PROCESSOR'S payment list.
6. The system will update the ARMS Web database.
7. If this is the last or only invoice in the action items list, then continue to step eight of the Basic Flow. Otherwise, the use case ends.
8. The system will check to see if the ADJUSTER'S office is set up for individual payment or bulk payment.
   - If the ADJUSTER'S office is set up for individual payment execute subflow 1.4.2.1, Individual Pay.
   - If the ADJUSTER'S office is set up for bulk payment execute subflow 1.4.2.2, Bulk Pay.

1.4.2.1 Individual Payment List

1. The system will display instructions for paying the invoices individually and a summary list of all the invoices just approved by the ADJUSTER.
2. For each invoice on the payment list, the ADJUSTER may enter the associated check number.
3. The ADJUSTER will submit the payment list to the system.
4. The system will mark the invoice paid
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.2.2 Bulk Payment List

1. The system will display instructions for paying the invoices in bulk and a summary list of all the invoices just approved by the ADJUSTER.
2. The ADJUSTER may enter the check number of the check that is paying all the invoices on the payment list.
3. The ADJUSTER will submit the payment list to the system.
4. The system will mark the invoice paid
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.2.3 Pay a Single Invoice

1. The ADJUSTER may enter the check number for the invoice being paid.
2. The system will mark the invoice paid
3. The system will update the ARMS Web database.
4. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Selected Action Item is Payment List

At step one of the Basic Flow, if the action item being worked is the "Payment List" action item, then the ADJUSTER will be taken immediately to step one of section 1.4.2.1 if they are set up for individual pay, or step one of section 1.4.2.2 if they are set up for bulk pay.

1.4.3.2 Reject an Invoice

At step one in the Basic Flow, the ADJUSTER may choose to reject the invoice. The rejection process is executed using extension point BI-03 – Reject an Invoice.

1.4.3.3 View Customer File

At Individual Payment List or Bulk Payment List, the ADJUSTER may choose to view detail information about the rental. The view rental detail process is executed using extension point MA-19 – View Customer File.

1.4.3.4 Print a Single Invoice

At step one in the Basic Flow, the ADJUSTER may choose to print the invoice. If they so choose, they may also print the rental history. The system will display a printer friendly screen and the ADJUSTER will choose to print via their browser window. Upon printing, the ADJUSTER will choose to return to the step one of the Basic Flow by hitting the "back" button on the web browser.

1.4.3.5 Print an Invoice List

At step one in section 1.4.2.1, Individual Pay, or section 1.4.2.2, Bulk Pay, the ADJUSTER may choose to print the invoice list of all invoices on the Payment List. If they so choose, they may also print the rental history for all invoices. The system will display a printer friendly screen and the ADJUSTER will choose to print via their browser window. Upon printing, the ADJUSTER will choose to return to the step one of section 1.4.2.1 if the ADJUSTER is set up for Individual Pay, or section 1.4.2.2 if the ADJUSTER is set up for Bulk Pay.

1.4.3.6 Skip Invoice

At step three in the Basic Flow, the ADJUSTER may choose to skip the invoice in question and handle it at a later time. The ADJUSTER will be taken to the next action item on their action item list. The status of the invoice should not be changed by the ARMS Web system.

1.4.3.7 Payment by PROCESSOR

If the ADJUSTER is only responsible for approving the invoice, then, after step four in the Basic Flow, the system will make the approved invoice an action item for the PROCESSOR(S) responsible for paying the ADJUSTER'S invoices. This ends the use case. Payment by PROCESSOR is handled via Functional Specification BI-02 – Pay Approved Invoices.

1.4.3.8 Amount Being Approved Exceeds USER'S Authorization Limits

When a USER attempts to approve an invoice for payment, the system will check to see if the amount due on the invoice is greater than the USER'S authorization amount. If the amount due is greater than the USER'S limit, the system will not allow the approval and will request that the USER transfer the invoice to another user with authorization limits that are great enough to approve the invoice.

1.4.3.9 Change Claim Number

At step one in the Basic Flow, if the status is "rejected" and if the profile allows, the ADJUSTER may choose to change the claim number associated with an invoice. Once a claim number has been updated, the ADJUSTER will continue with step four of the basic

1.5 Post-Conditions

- If the use case was successful and the ADJUSTER is responsible for paying invoices, the approved invoices should be marked as paid in the ARMS Web system.
- If the use case was successful and the ADJUSTER is only responsible for approving invoices, then the approved invoices should be marked as adjuster approved in the ARMS Web system.

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1   ARMS Web Routes Invoices

Before an ADJUSTER receives an invoice to be approved, the ARMS Web system will look at the invoicing criteria for the owning office and owning adjuster and make a determination as to whether the invoice is auto approved or adjuster approved. If an invoice is auto approved, the invoice will always be assigned to a processor for payment without it ever being sent to an adjuster for approval. The payment method may be either bulk or individual payment.

1.6.2   Includes Tax and Surcharge Data Field

On the invoice next to the authorized amount, the field "Includes Tax and Surcharge" will be displayed next to the Authorized total if that total should include taxes and surcharges. This will occur in two events. For an insured, if the authorized amount is less than the policy daily amount, the authorized total will include taxes and surcharges up to the policy daily amount. For a claimant, the authorized amount will always include taxes and surcharges, without limit, until the rental is terminated by the ADJUSTER.

1.6.3   Data Fields to Assist with Future Releases or Customer Integration

It must be possible to capture the following information at some point in the future because of either planned future releases or customer integration.

- Amount Being Paid on Each Invoice

1.7   Extension Points

An extension point indicates a link between this use case and another use case. Extension points associated with the use case are indicated below. Clicking on the extension point will open the related use case.

1.7.1   BI-03-Reject an Invoice

The Reject an Invoice Functional Specification is used to reject a specific invoice to Enterprise due to missing required information or an incorrect amount on the bill. Upon completion of the Reject an Invoice Functional Specification, the ADJUSTER should be returned to step six of the Basic Flow in the Handle Unapproved Invoices Functional Specification. Any previously approved invoices should still be approved in the system. The rejected invoice should be marked as rejected by the system. The Handle Unapproved Invoices Functional Specification will only allow for one invoice to be rejected at a time.

1.7.2   MA-19-View Rental Detail

The View Rental Detail Functional Specification is used to review the rental history in regards to a specific rental. Upon completion of the View Rental Detail Functional Specification, the ADJUSTER should be returned to step four of the Basic Flow in the Handle Unapproved Invoices Functional Specification. Any previously approved invoices should still be approved in the system.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Invoicing – Individual Payment

This screen will allow the user to choose to view the invoice selected in the action items list. They will choose to either pay this invoice immediately (pay now), or choose to add it to a payment list for payment later in conjunction with all their other invoices. They may also choose to print the invoice from this page. They may also optionally choose to print the rental history. The user may choose to change the claim number. Finally the user may choose to skip this invoice and leave it until later for review.

2.1.1 Invoicing – Individual Payment – see Figure E.41

Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Claims Office: 001   Handling for: Yourself

Invoicing for Weber, Andrew Claim no. 765849322-001
INDIVIDUAL PAYMENT

RENTAL:
Rental Branch Location:
6850 Ladue Rd
Saint Louis, MO 631240001
(314) 512-0294

Authorized
Authorized Period: 02/10/00 to 03/01/00 (20 days)
Days: 20
Rate: 22.99
Direct Bill Percent: 100%
Total authorized: 459.8 Plus Tax & Surcharges

Actual Rental
Rental Period: 02/10/00 to 03/01/00 (20 days)
Billed Period: 02/10/00 to 03/01/00 (20 days)
Actual Days:
20 @ $22.99/day = $505.78
Direct Bill Percent: 100%
Total Charges: $536.13
Amount Received: $0.00
Total Due: $536.13

NOTEBOOK:
Reservation for Weber, Andrew 2/21/00
Diary Note, Marty Sarussi, 2/21/00
Extension request, 2/24/00

● Top of page

INVOICE:
Reference: PPGM DU73062
Invoice Date: 02/10/00
Federal ID: 4800791835

CLAIM:
Renter: Weber, Andrew
Claim Number: 5698754821
Claim Type: Claimant
Vehicle Condition: Non-Driveable
Date of Loss: 02/05/00
Insured Name: Smith, Bob

Contact Us | Terms & Conditions | Log Off

More to sep. figure

Figure E.41

2.1.2   Invoicing – Individual Payment Screen Design

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	
	Output	15	Line Item Charge Description	Item Description	This line may repeat multiple times depending on the number of taxes and surcharges that apply.
	Output	15,2	Lint Item Charge Amount	Item Amount	Line Item Charge Qty * Line Item Charge Amount. This line may repeat multiple times depending on the number of taxes and surcharges tat apply.
Claim No:	Input	15	Claim Number	Insurance Claim Number	
Invoice Date:	Output	10	Invoice Date (Ecar's Ticket Date)	Record Add Date	
Reference:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID + ECARS Ticket Number
Please include this reference number on your check	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number
Federal ID:	Output	30	Location's Federal Id.	Federal ID Number	
Federal ID	Output	30	Location's Federal ID	Federal ID Number	
Amount Received	Output	15,2	Amount of rental charges received	Total Amount Received	
Total Due:	Input	15,2	Total Amount Due from Ins. Company	Total Amount Due	
Total Charges:	Output	15,2	Total Rental Ticket Charges	Total Ticket Charges	
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First Name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	150	Messages	NOTE	This field will repeat multiple lines for all diary notes (messages) for this reservation.
to	Output	10	Authorization Termination Date	End Date	
to	Output	10	Authorization Termination Date	End Date	
Direct Bill Percent	Output	15,0	Authorized Bill percentage	Bill To %	
Direct Bill Percent:	Output	15,0	Authorized Bill percentage	Bill To %	
Authorized Period:	Output	10	Authorized Start Date	Start Date	
Billed Period:	Output	10	Authorized Start Date	Start Date	
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with the claim number currently on the authorization.
to	Output	10	Close date of Rental Ticket	End Date	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Policy: Daily Rate/Max Dollars:	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Dollars Per Day Covered	
Policy: Daily Rate/Max Dollars:	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Max $ Covered	
Rental Period:	Output	10	Start date of Rental Ticket	Start Date	
Insured Name	Output	30	Insured's Name	First Name + Last Name	
For	Output	30	Insured's name	First Name + Last Name	
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	
	Output	30	Rental Location's Mailing Street Address	Address Line + Addres Line2	
	Output	15	Rental Location's Phone Number	Telephone Number	
	Output	30	Rental Location's Mailing City, State, and Zip	City	
	Output	30	Rental Location's Mailing City, State, and Zip	State	
	Output	30	Rental Location's Mailing City, State, and Zip	Zip Code	
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	
	Output	15	Rental Location's Phone Number	Telephone Number	This field is repeated for each invoice in the payment list.
Renter	Output	30	Renter's Name	First Name + Last Name	
(	Output	5	Number of Authorized Days	CALCULATED	
(	Output	5	Number of authorized days	CALCULATED	
(	Output	5	Number of Rental Days	CALCULATED	
Total Due	Output	15,2	Total Amount Due from Ins. Company	CALCULATED	Total Charges - Amount Received
Number of Authorized Dates +"@" + authorized Daily Rate + "/day="	Output	15,2	Total Authorized Amount before tax and surcharge	CALCULATED	Number of Authorized Days * Authorized Daily Rate
Total authorized includes Tax & Surcharge	Output	15,2	Total authorized Amount with Tax and surcharge	CALCULATED	(Number of authorized Days * Authorized Daily Rate) + Calculated Tax and surcharge

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Number of Rental Days + "@" + ECAR's Ticket Daily Rate + "/day="	Output	15,2	Total Ticket Rental Amount before tax and surcharg	CALCULATED	Number of Rental Days * ECARS Ticket Daily Rate
Claim Type:	Output	10	Claim Type	claim type description	
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	20	Loss Type	loss type description	
Rental	Output	30	Rental Location's Accounting Name	accounting name	
Send Payment To:	Output	30	Rental Location's Accounting Name	accounting name	
Check Number for you payment:	Input	20	Check Number	check number	

2.1.3   Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1   PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoice.

2.1.3.2   REJECT

When clicked, the user will be taken to the Reject Invoice process.

2.1.3.3   PAY NOW

When clicked, the system will edit the current information. If the edit passes, the invoice will be marked as paid and the data files updated. If the validation fails, the user will be returned to the current screen with the errors highlighted.

2.1.3.3.1   The system will validate that the user has an authorization limit high enough to approve the invoice. If not, the system will generate an error and ask the USER to transfer the invoice.

2.1.3.4   ADD TO PAYMENT LIST

When clicked, the system will edit the current information for check number and claim number. If the edit passes, the invoice will be marked as approved and will be added to the ADJUSTER'S payment list and the user will be returned to the Review List process.

2.1.3.5   SKIP>>

When clicked, the user will be advanced to the next action item to be processed and the current invoice will remain unchanged (un-approved).

2.1.3.6 Top of Page

When clicked, the user will be taken to the top of the current invoice page.

2.1.3.7 Transfer File

When clicked, the system will present a list of users that have authorization limits greater than the amount due on the invoice. The USER may then choose one user from this list to which they may transfer the file.

2.1.3.8 Policy Information

Policy Information will only be shown under the Authorized Section if the claim type is NOT claimant.

2.2 Invoicing - Approval

This screen will allow the user to choose to view the invoice selected in the action items list. They may choose to approve the invoice payment. This will add the invoice to the PROCESSOR(S) that are responsible for paying the ADJUSTER'S invoices. The user may also choose to skip this invoice and leave it until later for review. They may choose to print the invoice from this page. They may also optionally choose to print the rental history. Finally, the user may choose to change the claim number.

2.1.1 Screen Layout – invoicingApproval.shtml — *see Figure E.42*

Welcome to the
Automated Rental Management System

create a   Find a
RESERVATION CUSTOMER

Claims Office: 001   Handling for: Yourself

Invoicing for Weber, Andrew Claim no. 765849322-001
INDIVIDUAL PAYMENT

RENTAL:
Rental Branch Location:
6950 Ladue Rd.
Saint Louis, MO 631240001
(314) 512-0294

Authorized
Authorized Period: 02/10/00 to 03/01/00 (20 days)
Days: 20
Rate: 22.99
Direct Bill Percent: 100%
Total authorized: 459.8 **Plus Tax & Surcharges**

Actual Rental
Rental Period: 02/10/00 to 03/01/00 (20 days)
Billed Period: 02/10/00 to 03/01/00 (20 days)
Actual Days:
   20 @ $22.99/day = $505.78
Direct Bill Percent: 100%
Total Charges: $536.13
Amount Received: $0.00
   Total Due: **$536.13**

NOTEBOOK:
Reservation for Weber, Andrew 2/21/00
Diary Note, Marty Sanassi, 2/21/00
Extension request, 2/24/00

● top of page

INVOICE:
Reference: PPGM D07-3082
Invoice Date: 02/10/00
Federal ID: 4800791835

CLAIM:
Renter: Weber, Andrew
Claim Number: 5698754821
Claim Type: Claimant
Vehicle Condition: Non-Driveable
Date of Loss: 02/05/00
Insured Name: Smith, Bob

Contact Us | Terms & Conditions | Log Off

Figure E.42

2.2.2 Invoicing Approval

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	152	Line item Charge Amount	Item Amount	Line Item Charge Qty * Line Item Charge Amount. This line may repeat multiple times depending on the number of taxes and surcharges that apply.
	Output	15	Line Item Charge Description	Item Description	This line may repeat multiple times depending on the number of taxes and surcharges that apply.
Claim No:	Output	15	Claim Number	Insurance Claim Number	
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization.
To	Output	10	Close Date of billing of Rental Ticket	Bill to End Date	
Invoice Date:	Output	10	Invoice Date (ECARs Ticket Date)	Record Add Date	
Reference	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number
Federal ID:	Output	30	Location's Federal Id.	Federal ID Number	
Billed Period	Output	10	Start date of billing of Rental Ticket	Bill to Start Date	
Amount Received:	Output	15,2	Amount of rental received.	Total Amount Received	
Total Due	Output	15,2	Total amount due from Ins. Company	Total Amount Due	
Total Charges:	Output	15,2	Total Rental Ticket Charges	Total Ticket Charges	
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	50	Messages	NOTE	This field will repeat multiple lines for all diary notes (messages) for a reservation
To	Output	10	Authorization Termination Date	End Date	
Direct Bill Percent:	Output	15,0	Authorized Bill percentage	Bill To %	
Direct Bill Percent	Output	15,0	Authorized Bill percentage	Bill To %	
Authorized Period:	Output	10	Authorized Start Date	Start Date	
To	Output	10	Close Date of Rental Ticket	End Date	
Policy: Daily Rate/Max Dollars	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Dollars Per Day Covered	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Policy: Daily Rate/Max Dollars	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Max $ Covered	
Rental Period:	Output	10	Start date of Rental Ticket	Start Date	
Insured Name:	Output	30	Insured's name	First Name + Last Name	
For:	Output	30	Insured's Name	First Name + Last Name	Renter's Last Name + Renter's First Name
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	Mailing City + Mailing State + Mailing Zip
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	
	Output	15	Rental Location's Phone Number	Telephone Number	
Date of loss:	Output	20	Date of loss	Date Of Loss	
Renter	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
(	Output	5	Number of Authorized Days	CALCULATED	Total number of authorized rental days
(	Output	5	Number of Billed Days	CALCULATED	
(	Output	5	Number of Rental Days	CALCULATED	Total number of authorized Rental Days
Total Due:	Output	15,2	Total Amount Due from Ins. Company	CALCULATED	Total Charges - Amount Received
Number of Authorized Days +"@" + Authorized Daily Rate + "/day="	Output	15,2	Total authorized amount before tax and surcharge	CALCULATED	Number of Authorized Days * Authorized Daily Rate
Total authorized includes Tax & Surcharge	Output	15,2	Total Authorized Amount with tax and surcharge	CALCULATED	(Number of authorized Days * Authorized Daily Rate) + (Calculated Tax and surcharge)
Number of Rental Days + "@" + ECAR's Ticket Daily Rate + "/day="	Output	15,2	Total Ticket Rental Amount before tax and surcharg	CALCULATED	Number of Rental Days * ECARS Ticket Daily Rate
Claim Type:	Output	10	Claim Type	claim type description	Claimant, Insured, etc.
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Rental	Output	30	Rental Location's Accounting Name	accounting name	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoice.

2.2.3.2 REJECT

When clicked, the user will be taken to the Reject Invoice process.

2.2.3.3 APPROVE FOR PAYMENT

When clicked, the currently displayed invoice status will be marked as approved and the user will be taken to the next Action Item.

- The system will validate that the user has an authorization limit high enough to approve the invoice. If not, the system will generate an error and ask the USER to transfer the invoice.

- Another adjuster has not already approved the invoice.

2.2.3.4 SKIP>>

When clicked, the user will be advanced to the next selected action item to be processed and the current invoice will remain unchanged (un-approved).

2.2.3.5 Top of Page

When clicked, the user will be taken to the top of the current invoice page.

2.2.3.6 Transfer File

When clicked, the system will present a list of users that have authorization limits greater than the amount due on the invoice. The USER may then choose one user from this list to which they may transfer the file.

2.2.3.7 Policy Information

Policy Information will only be shown under the Authorized Section if the claim type is NOT claimant.

2.3   Individual Payment List

This screen provides the user with information on what the system expects them to do, and requests a
check number that will be used to pay each invoice. The user may also choose to print the invoices, and
optionally print the rental history in addition to the invoices. The user may choose not to process the
payment list at this time, in which case the payment list will be added to the user's action items list.

2.3.1   Screen Layout -invoicingPymtList.shtml   — see Figure E.43

Figure E.43

2.3.2 Individual Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for eahc invoice in the payment list. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID+ ECARS Ticket number. This field is repeated for each invoice in the payment list.
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	15,2	Total amount due from Ins. Company	Total Amount Due	Total Charges - Amount Received This field is repeated for each invoice in the payment list.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	First Name + Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location 's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list. Count
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.
Remit to:	Output	30	Rental Locaiton's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Enter the check number of your payment here:	Input	20	Check Number	check number	This field is repeated for each invoice in the payment list.

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoices.

2.3.3.2 CONFIRM PAYMENT

When clicked, system will mark the reservation as paid and update the database. The update will be passed to the Arms system.

2.3.3.3 PAY LATER

When clicked, the user will be returned to view list and the requests will remain unchanged.

2.3.3.4 Top of Page

When clicked, the user will be taken to the top of the current invoice page.

2.4 Bulk Payment List

This screen provides the user with information on what the system expects them to do, and requests a check number that will be used to pay each invoice. The user may also choose to print the invoices, and optionally print the rental history in addition to the invoices. The user may choose not to process the payment list at this time, in which case the payment list will be added to the user's action items list.

2.4.1 Screen Layout – Bulk Payment List ~ see Figure E.44

Move to sep. figure

Welcome to the
Automated Rental Management System

create a RESERVATION   find a CUSTOMER

Claims Office: 001   Handling for: Yourself

Invoicing for Weber, Andrew Claim no. 765849322-001
INDIVIDUAL PAYMENT

$536.13

RENTAL:
Rental Branch Location:
6860 Ladue Rd.
Saint Louis, MO 631240001
(314) 512-0294

Authorized
Authorized Period: 02/10/00 to 03/01/00 (20 days)
Days: 20
Rate: 22.99
Direct Bill Percent: 100%
Total authorized: 459.8 Plus Tax & Surcharges

Actual Rental
Rental Period: 02/10/00 to 03/01/00 (20 days)
Billed Period: 02/10/00 to 03/01/00 (20 days)
Actual Days:
  20 @ $22.99/day = $505.78
Direct Bill Percent: 100%
Total Charges: $536.13
Amount Received: $0.00
  Total Due: $536.13

NOTEBOOK:
Reservation for Weber, Andrew 2/21/00
Diary Note, Marty Sarussi, 2/21/00
Extension request, 2/24/00

● top of page

INVOICE:
Reference: PPGM D073082
Invoice Date: 02/10/00
Federal ID: 4800791835

CLAIM:
Renter: Weber, Andrew
Claim Number: 5698754821
Claim Type: Claimant
Vehicle Condition: Non-Driveable
Date of Loss: 02/05/00
Insured Name: Smith, Bob

Contact Us | Terms & Conditions | Log Off

Figure E.44

2.4.2 Bulk Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID+ ECARS Ticket number. This field is repeated for each invoice in the payment list.
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number. This field is repeated for each invoice in the payment list.
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	15,2	Total amount due from Ins. Company	Total Amount Due	Total Charges - Amount Received. This field is repeated for each invoice in the payment list.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	First Name + Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location 's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + Sate + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list. Count
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.
Remit to:	Output	30	Rental Locaiton's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.

2.4.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.4.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoices.

2.4.3.2 CONFIRM PAYMENT

When clicked, the system will mark the reservation as paid and update the database. The update will be passed to the Arms system. The user will then be returned to the next action item or the Action Items screen if no more action items exist.

2.4.3.3 PAY LATER

When clicked, the user will be returned to Action Items and the request will remain unchanged.

2.4.3.4 Top of Page

When clicked, the user will be taken to the top of the payment list.

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Get Unapproved Invoices (Adjuster Id)

The build unapproved invoice list operation finds all the invoices, that need approval, for the specified adjuster.

3.2 Approve Invoice (Invoice Number)

The approve invoice operation marks the specified invoice as approved. This invoice is now ready to be paid.

3.3 Get Approved Invoices (Adjuster Id)

The build approved invoice list operation finds all the approved invoices for the specified adjuster.

3.4 Get Invoice Detail (Invoice Number)

The build invoice detail operation gets the relevant invoice information for the specified invoice number.

3.5 Pay Invoice (Invoice Number, Check Number)

The pay invoice operation records the check number specified by the adjuster against the specified invoice and marks the invoice as paid.

4.   Data Fields

4.1   Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1   accounting name

Entity	OFFDRB OFFICE DIRECTORY BRANCH MASTER
Column Name	acctg_nam
Label Name	Accounting Name
System Name	
Data Type	VARCHAR(8)
Attribute Definition	

4.1.2   action item assigned date

Entity	ACTION ITEM
Column Name	actn_item_assn_dte
Label Name	action item assigned date:
System Name	AITMASGNDT
Data Type	DATE
Attribute Definition	The action item assigned date is the date the action item was established and assigned to an administrator or adjustor.

4.1.3   action item complete date

Entity	ACTION ITEM
Column Name	actn_item_cmpl_dte
Label Name	action item complete date:
System Name	AITMCMPLDT
Data Type	DATE
Attribute Definition	The action item complete date is the date the action item was completed by an administrator or adjustor.

4.1.4   action item effective date

Entity	ACTION ITEM
Column Name	actn_item_eff_dte
Label Name	action item effective date:
System Name	AITMEFFDT
Data Type	DATE
Attribute Definition	The action item effective date is the date the action item will become effective.

4.1.5   action item status code

Entity	ACTION ITEM
Column Name	actn_item_stat_cde
Label Name	action item status code:
System Name	
Data Type	CHAR(6)
Attribute Definition	The action item status code defines the status of this action item. For example:

4.1.6 action item type code

Entity	ACTION ITEM
Column Name	actn_item_typ_cde
Label Name	action item type code:
System Name	
Data Type	DEC(3,0)
Attribute Definition	The action item type code defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors and administrators when contracting an insured with a replacement vehicle. For example: Closing an Of

4.1.7 action item type description

Entity	ACTION ITEM TYPE
Column Name	actn_item_typ_dsc
Label Name	action item type description:
System Name	
Data Type	CHAR(40)
Attribute Definition	The action item type description is a lexical definition of an action item type code which defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors and administrators when contracting an

4.1.8 action related adjustor code

Entity	ACTION ITEM
Column Name	actn_rel_adjr_cde
Label Name	Adjustor Code
System Name	ARADJRCDE
Data Type	CHAR(10)
Attribute Definition	The action related adjustor codeis the adjustor code of the adjustor/user which requires completion of some action item work activity such as an office closing and adjustors/users who need to be moved to another office.

4.1.9 action related company identifier

Entity	ACTION ITEM
Column Name	actn_rel_cmpy_id
Label Name	ARMS Profile ID
System Name	ARCMPYID
Data Type	CHAR(5)
Attribute Definition	The action related company identifier is the company identifier of the adjustor/user which requires completion of some action item work activity such as an office closing and adjustors/users who need to be moved to another office.

4.1.10 Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	

System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.11 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.12 Adjustor Code

Entity	ARM: Adjustor Master
Column Name	ALAACD
Label Name	Adjustor Code
System Name	
Data Type	CHAR(10)
Attribute Definition	

4.1.13 ARMS Profile ID

Entity	ACTION ITEM
Column Name	ALCUID
Label Name	ARMS Profile ID
System Name	
Data Type	CHAR(5)
Attribute Definition	The ARMS Profile ID is the company identifier used to uniquely define an authorization.

4.1.14 ARMS Profile ID

Entity	ARM: Adjustor Master
Column Name	ALCUID
Label Name	ARMS Profile ID
System Name	
Data Type	CHAR(5)
Attribute Definition	

4.1.15 assigned to adjustor code

Entity	ACTION ITEM
Column Name	assgn_to_adjr_cde
Label Name	Adjustor Code
System Name	AADJRCDE
Data Type	CHAR(10)
Attribute Definition	The assigned to adjustor code is the adjustor code of the administrator or adjustor's who is assigned the action item.

4.1.16 assigned to company identifier

Entity	ACTION ITEM
Column Name	assgn_to_cmpy_id
Label Name	ARMS Profile ID
System Name	ACMPYID
Data Type	CHAR(5)
Attribute Definition	The assigned to company identifier is the company identifier of the administrator or adjustor's who is assigned the action item.

4.1.17 Bill To %

Entity	ARM: Authorization(Claim Info)
Column Name	AZBTPC
Label Name	Bill To %
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.18 Bill to End Date

Entity	A4 Invoice Header
Column Name	I1BTDT
Label Name	Bill to End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.19 Bill to Start Date

Entity	A4 Invoice Header
Column Name	I1SRDT
Label Name	Bill to Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.20 check number

Entity	RENTAL INVOICE PAYMENT
Column Name	chk_nbr
Label Name	check number:
System Name	CHKNBR
Data Type	DEC(11,0)
Attribute Definition	

4.1.21 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.22   claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.23   company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.24   company structure level code

Entity	ACTION ITEM
Column Name	cmpy_strct_lvl_cde
Label Name	company structure level code:
System Name	CMPYSLVLCD
Data Type	DEC(3,0)
Attribute Definition	The external organization structure level code identifies the kind or type of internal organizations of the external organizations which Enterprise Rent-A-Car does business with. Such as: Corporation, Branch Claims Office, Region, Area, Subregion, etc.

4.1.25   Customer Transaction ID

Entity	ACTION ITEM
Column Name	AZCUTI
Label Name	Customer Transaction ID
System Name	
Data Type	CHAR(20)
Attribute Definition	The Customer Transaction ID is the authorization transaction identifier which along with a company identifier uniquely define an authorization.

4.1.26   Date Of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date Of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.27 Dollars Per Day Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ$PDY
Label Name	Dollars Per Day Covered
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.28 End Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZENDT
Label Name	End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.29 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.30 external organization identifier

Entity	ALTERNATE ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.31 Federal ID Number

Entity	A4 Invoice Header
Column Name	I1FETX
Label Name	Federal ID Number
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.32 First Name

Entity	ARM: Adjustor Master

Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.33 First Name

Entity	ARM: Insured Detail
Column Name	IRFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.34 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.35 handled by adjustor code

Entity	ACTION ITEM
Column Name	handl_by_adjr_cde
Label Name	Adjustor Code
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handled by adjustor code is the adjustor code of the administrator or adjustor's who is handling the action item.

4.1.36 handled by company identifier

Entity	ACTION ITEM
Column Name	handl_by_cmpy_id
Label Name	ARMS Profile ID
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handled by company identifier is the company identifier of the administrator or adjustor's who is handling the action item.

4.1.37 handling for adjustor code

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_adtr_cde
Label Name	handling for adjustor code:
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handling for adjustor coder is the adjustor code of an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS

	Web application.

4.1.38 handling for company identifier

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_cmpy_id
Label Name	handling for company identifier:
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handling for company identifier is the company identifier used to uniquely identify an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.39 Insurance Claim Number

Entity	A4 Invoice Header
Column Name	I1CLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.40 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.41 Invoice Number

Entity	A4 Invoice Header
Column Name	I1INNO
Label Name	Invoice Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.42 Item Amount

Entity	A4 Invoice Detail
Column Name	I2IT$$
Label Name	Item Amount
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

4.1.43 Item Description

Entity	A4 Invoice Detail
Column Name	I2ITDS

Label Name	Item Description
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.44 Item Quantity

Entity	A4 Invoice Detail
Column Name	I2ITQY
Label Name	Item Quantity
System Name	
Data Type	DECIMAL(5)
Attribute Definition	

4.1.45 Item Rate

Entity	A4 Invoice Detail
Column Name	I2ITRT
Label Name	Item Rate
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

4.1.46 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.47 Last Name

Entity	ARM: Insured Detail
Column Name	IRLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.48 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.49 loss type description

Entity	LOSS TYPE

Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.50 Max $ Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ$MAX
Label Name	Max $ Covered
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.51 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.52 Number Of Days Authorized

Entity	ARM: Authorization(Claim Info)
Column Name	AZAUDY
Label Name	Number Of Days Authorized
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.53 Record Add Date

Entity	A4 Invoice Header
Column Name	IIADDT
Label Name	Record Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.54 related office identifier

Entity	ACTION ITEM
Column Name	rel_ofc_id
Label Name	related office identifier:
System Name	RELOFCID
Data Type	DEC(11,0)
Attribute Definition	The related office identifier is the identifier of the office responsible for the

	action item.

4.1.55   Remittance Reference

Entity	A4 Remit Reference No.
Column Name	Q5RMNO
Label Name	Remittance Reference #
System Name	
Data Type	NUMERIC(6)
Attribute Definition	

4.1.56   Request Type

Entity	ACTION ITEM TYPE
Column Name	XURSTP
Label Name	Request Type
System Name	XURSTP
Data Type	CHAR(1)
Attribute Definition	The request type is a code from the ARMS system which identifies whether adjusor action is necessary for an authorization and what type of action.

4.1.57   Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT
Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.58   State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.59   Status Code

Entity	ACTION ITEM TYPE
Column Name	XUSTCD
Label Name	Status Code
System Name	XUSTCD
Data Type	CHAR(1)
Attribute Definition	The status code is a code from the ARMS system which identifies whether an authorization is a reservation, a ticket, unauthorized, invoiced, paid, etc.

4.1.60   Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO

Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.61 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL$$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.62 Total Amount Received

Entity	A4 Invoice Trailer
Column Name	I3RC$$
Label Name	Total Amount Received
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.63 Total Billed to Others

Entity	A4 Invoice Trailer
Column Name	I3OT$$
Label Name	Total Billed to Others
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.64 Total Ticket Charges

Entity	A4 Invoice Trailer
Column Name	I3TO$$
Label Name	Total Ticket Charges
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.65 Vehicle Rate

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHRT
Label Name	Vehicle Rate
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.66 Zip Code

Entity	ARM: Rental Location Master

Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

5. Questions and Answers

Issue Number: 256

Question: The calculation for authorized limit when displaying the invoice detail does not take bill to percent into account when all the following conditions are true:

        Policy Maximum = 0
        Policy Daily > 0
        Vehicle Rate > 0
        Vehicle Rate < Policy Daily

or all the following conditions are true:

        Policy Maximum > 0
        Policy Daily = 0
        Vehicle Rate > 0

In all other cases, the amount is multiplied by the bill to percent to get the authorized limit.
Is this calculation correct ?

Status: Pending

Resolution: 3-14-00, DSE-Need to follow up with author to get an further understanding of question.
3-23-00, Issue Mtg, Will get addressed in current state and fix.

Issue Number: 257

Question: This is a presentation issue. The adjuster name on the invoice detail screen will not show up in certain cases. This code is in the *INZSR sub routine and needs some investigation of scenarios to determine the exact flaw.

Status: Closed - Resolved

Resolution: 3-14-00, DSE-Need to follow up with author to get an further understanding of question.

Enterprise Rent-A-Car

**Functional Design Specification
Pay Approved Invoices
(Processor Pay)**

Version 1.0

Last Saved: 6/29/00 8:56 AM

Revision History

Date	Issue	Description	Author
April 21, 2000	0.1	Initial Draft	Brad Reel
April 24, 2000	0.2	Revised to reflect initial team review	Brad Reel
May 9, 2000	0.3	Updated sections and removed subdocuments	Brad Reel, Deb Ealick, Anil Kabra, Cindy Bastean
May 10,2000	0.4	Made screen changed and added to document	Debi Ealick
June 7, 2000	0.5	Added Data Fields and new Screen Fields Table	Cindy Bastean
June 13, 2000	1.0	Revising for iteration two	Brad Reel
June 29, 2000	1.0	Revised Data Field and Screen Field Information	Cindy Bastean
June 30, 2000	1.0	Updated various sections	Brad Reel
September 15, 2000	1.1	Updated various sections	Brian Weingart

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Invoicing:
BULK PAYMENT LIST   GEICO

Checklist:

ARMS does not PAY your invoices.

☐ Print Rental History List

You may also choose to complete this transaction
at a later time.

Weber, Andrew	Invoice 1 **Invoice:** PPGM D073082 **Federal ID:** 48-0791835 **Invoice Date:** 10/22/99 Claim **Claim Number:** 5698754821 **Claim Type:** Claimant **Vehicle Condition:** Driveable **Date Of Loss:** 10/10/99 **Adjuster:** Fitzgerald, Neil **Claims Office:** 001	**Rental Branch Location** 6860 Ladue Rd St. Louis, Mo 63124-4001 314-512-0294 **Total Due:** $512.36
Crystal, Billy	Invoice 2 **Invoice:** PPGM D073082 **Federal ID:** 48-0791835 **Invoice Date:** 10/22/99 Claim **Claim Number:** 5698754821 **Claim Type:** Claimant **Vehicle Condition:** Driveable **Date Of Loss:** 10/10/99 **Adjuster:** Fitzgerald, Neil **Claims Office:** 001	**Rental Branch Location** 234 Bonhomme St. Clayton, Mo 63100-2001 314-539-9899 **Total Due:** $512.36

❶ Please include this reference # on your check:
   567347585
❷ Remit to: Enterprise Rent-a-Car
❷ 2 Invoices
   Total Amount: $536.13
❹ Enter the check number for your payment here:

❺ Send Payment to:
   Enterprise Rent-a-Car
   6860 Ladue Rd
   St. Louis, Mo 63124-0001

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1. Pay Approved Invoices Use Case

1.1 Brief Description

The Pay Approved Invoices use case describes how the PROCESSOR would review and pay invoices in the ARMS Web system.

1.2 Use Case Actors

The following actors will interact with this use case:

- **PROCESSOR** – The PROCESSOR will use this use case to pay approved invoices.

1.3 Pre-Conditions

- The PROCESSOR must be logged into the ARMS Web system.
- The PROCESSOR'S office must be set up to handle processor payment of invoices.
- The PROCESSOR must be authorized to handle invoices.

1.4 Flow of Events

The Flow of Events will include the necessary steps for a PROCESSOR to review and pay invoices.

1.4.1   Activity Diagram   − see Figure E.45
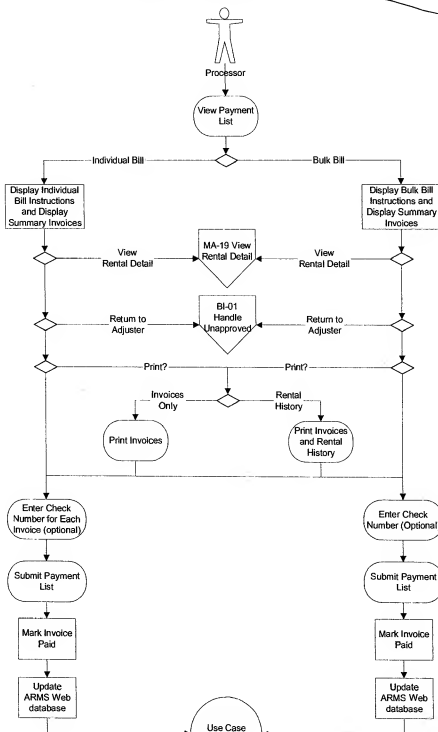
Pay Approved Invoices Activity Diagram

Figure 6.45

\\FSCORP00\corp_public\APPS\#ARMSWeb\Application\@dkb\ARMS Web\Release One\BI-Billing and
Invoicing\BI-02 Pay Approved Invoices\ACTIVITY DIAGRAMS\BI-02-ACTIVITY DIAGRAM.VSD
9/15/00

1.4.2 Basic Flow

1. The PROCESSOR will view their payment list.
2. The system will check to see if the PROCESSOR'S office is set up for individual payment or bulk payment.
   - If the PROCESSOR'S office is set up for individual payment execute subflow 1.4.2.1, Individual Pay.
   - If the PROCESSOR'S office is set up for bulk payment execute subflow 1.4.2.2, Bulk Pay.

1.4.2.1 Individual Pay

1. The system will display instructions for paying the invoices individually and a summary list of all the invoices on the PROCESSOR'S payment list.
2. For each invoice on the payment list, the PROCESSOR may enter the associated check number.
3. The PROCESSOR will submit the invoices to the system.
4. The system will mark the invoices paid.
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.2.2 Bulk Pay

1. The system will display instructions for paying the invoices in bulk and a summary list of all the invoices on the PROCESSOR'S payment list.
2. The ADJUSTER may enter the check number of the check that is paying all the invoices on the payment list.
3. The PROCESSOR will submit the invoices to the system.
4. The system will mark the invoices paid.
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 View Customer File

At step one of Section 1.4.2.1, Individual Pay, or Section 1.4.2.2, Bulk Pay, the PROCESSOR may choose to view detail information about the rental. The view rental detail process is executed using extension point MA-19 -- View Customer File.

1.4.3.2 Return an Invoice

At step one of Section 1.4.2.1, Individual Pay or Section 1.4.2.2, Bulk Pay the PROCESSOR may choose to return any invoice to the ADJUSTER. The PROCESSOR may enter a message to explain why they returned the invoice. The returned invoice should be given a status of returned invoice. The invoice will then become an action item for the owning ADJUSTER to review and correct.

1.4.3.3 Print an Invoice List

At step one in section 1.4.2.1, Individual Pay, or section 1.4.2.2, Bulk Pay, the PROCESSOR may choose to print the invoice list of all invoices on the Payment List. If they so choose, they may also print the rental history for all invoices. The system will display a printer friendly screen and the PROCESSOR will choose to print via their browser window. Upon printing, the PROCESSOR will return to the step one of section 1.4.2.1 if the PROCESSOR is set up for Individual Pay, or section 1.4.2.2 if the PROCESSOR is set up for Bulk Pay.

1.5 Post-Conditions

- If the use case was successful the accepted invoices should be marked as paid in the ARMS Web

system.
- If the use case was unsuccessful, the system state is unchanged.

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 ARMS Web Routes Invoices

Before an ADJUSTER receives an invoice to be approved, the ARMS Web system will look at the invoicing criteria for the owning office and owning adjuster and make a determination as to whether the invoice is auto approved or adjuster approved. If an invoice is auto approved, the invoice will always be assigned to a processor for payment without it ever being sent to an adjuster for approval.

1.6.2 Data Fields to Assist with Future Releases or Customer Integration

It must be possible to capture the following information at some point in the future because of either planned future releases or customer integration.

- Amount Being Paid on Each Invoice

1.6.3 Claim Number is Editable on the Invoice

If a company is set up for EDI transmission of invoices to the company's claim system, that company must have the ability to change the claim number on the invoice.

1.7 Extension Points

1.7.1 MA-19-View Customer File

The View Customer File Functional Specification is used to review the rental history in regards to a specific rental. Upon completion of the View Customer File Functional Specification, the ADJUSTER should be returned to step one of Section 1.4.2.1, Individual Pay, or Section 1.4.2.2, Bulk Pay in the Handle Unapproved Invoices Functional Specification. Any previously approved invoices should still be approved in the system.

2.　　Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1　　Invoicing - Individual Payment List

This screen will allow the user to enter a check number for each invoice and notify Enterprise that they have processed the payment.

2.1.1 Individual Payment List — see Figure E.46

Welcome to the
Automated Rental Management System

create a RESERVATION   find a CUSTOMER

Claims Office: 001   Handling for: Yourself

Invoicing:
INDIVIDUAL PAYMENT LIST

Checklist:

ARMS does not PAY your invoices.

☐ Print Rental Receipts

Weber, Andrew   **Invoice 1**

Invoice: PPGM D073082
Federal ID: 48-0791835
Invoice Date: 10/22/99
Claim
Claim Number: 569875648Z1
Claim Type: Claimant
Vehicle Condition: Driveable
Date of Loss: 10/10/99

Rental Branch Location:
6860 Ladue Rd.
St. Louis MO 63124-0001
314-512-0294

❶ Please include this reference number on your check:
567347595

❷ Remit to: Enterprise Rent-A-Car

❸ Total Amount: $536.13

❹ Enter the check number for your payment here:
[   ]

❺ Send Payment to:
Enterprise Rent-A-Car
6860 Ladue Rd.
St. Louis, MO 63124-0001

Crystal, Billy   **Invoice 2**

Invoice: PPGM D073082
Federal ID: 48-0791835
Invoice Date: 10/22/99
Claim
Claim Number: 569879987655
Claim Type: Claimant
Vehicle Condition: Driveable
Date of Loss: 10/10/99

Rental Branch Location:
234 Bonhomme St.
Clayton, MO 63100-2011
314-539-9899

❶ Please include this reference number on your check:
56789976

❷ Remit to: Enterprise Rent-A-Car

❸ Total Amount: $536.13

❹ Enter the check number for your payment here:
[   ]

❺ Send Payment to:
Enterprise Rent-A-Car
6860 Ladue Rd.
St. Louis, MO 63124-0001

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Figure E.46

1.2.2 Individual Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for eahc invoice in the payment list. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID+ ECARS Ticket number. This field is repeated for each invoice in the payment list.
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number This field is repeated for each invoice in the payment list.
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	15,2	Total amount due from Ins. Company	Total Amount Due	Total Charges - Amount Received This field is repeated for each invoice in the payment list.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	First Name + Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location 's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list. Count
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.
Remit to:	Output	30	Rental Locaiton's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Enter the check number of your payment here:	Input	20	Check Number	check number	This field is repeated for each invoice in the payment list.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoice.

2.1.3.2 CONFIRM PAYMENT

When clicked, system will mark the reservation as paid and update the database. The update will be passed to the Arms system.

2.1.3.3 PAY LATER

When clicked, the user will be returned to their action item list and the payment list will remain unprocessed.

2.1.3.4 RETURN TO ADJUSTER

When clicked, the invoice will be returned to the last adjuster associated with the rental before it closed. The invoice will be removed from the list displayed.

2.1.3.5 Top of Page

When clicked, the user will be taken to the top of the current invoice page.

2.2   Bulk Payment List

This screen will allow the user to pick which functions that he/she may want to change.

2.2.1   Screen Layout – Bulk Payment List   – see Figure E.47

Welcome to the
Automated Rental Management System

create a   find a
RESERVATION   CUSTOMER

Claims Office: 001   Handling for   Yourself

Invoicing:
BULK PAYMENT LIST   GEICO

ARMS does not PAY your invoices.   Print Header Display

Weber, Andrew   Invoice 1   **Rental Branch Location**
                         Invoice: PPGM D073082 6850 Ladue Rd
                         Federal ID: 48-0791835 St. Louis, Mo 63124-4001
                         Invoice Date: 10/22/99 314-512-0294
                         Claim

                         Claim Number: 5698754821
                         Claim Type: Claimant
                         Vehicle Condition: Driveable
                         Date Of Loss: 10/10/99   **Total Due:** $512.36
                         Adjuster: Fitzgerald, Neil
                         Claims Office: 001

Crystal, Billy   Invoice 2   **Rental Branch Location**
                         Invoice: PPGM D073082 234 Bonhomme St.
                         Federal ID: 48-0791835 Clayton, Mo 63100-2001
                         Invoice Date: 10/22/99 314-539-9899
                         Claim

                         Claim Number: 5698754821
                         Claim Type: Claimant
                         Vehicle Condition: Driveable
                         Date Of Loss: 10/10/99   **Total Due:** $512.36
                         Adjuster: Fitzgerald, Neil
                         Claims Office: 001

❶ Please include this reference # on your check
567347585

❷ Remit to: Enterprise Rent-a-Car

❸ 2 invoices
Total Amount: $536.13
❹ Enter the check number for your payment here

❺ Send Payment to:
Enterprise Rent-a-Car
6850 Ladue Rd
St. Louis, Mo 63124-0001

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2.2.2

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Move to next page / line

Figure E.47

Invoicing – Bulk Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID+ ECARS Ticket number. This field is repeated for each invoice in the payment list.
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number This field is repeated for each invoice in the payment list.
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	152	Total amount due from Ins. Company	Total Amount Due	Total Charges - Amount Received This field is repeated for each invoice in the payment list.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location 's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list. Count
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.
Remit to:	Output	30	Rental Locaiton's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoice.

2.2.3.2 CONFIRM PAYMENT

When clicked, system will mark the reservation as paid and update the database. The update will be passed to the Arms system.

2.2.3.3 PAY LATER

When clicked, the user will be returned to their action item list and the payment list will remain unprocessed.

2.2.3.4 RETURN TO ADJUSTER

When clicked, the invoice will be returned to the last adjuster associated with the rental before it closed. The invoice will be removed from the list displayed.

2.2.3.5 Top of Page

When clicked, the user will be taken to the top of the current invoice page.

2.3 Return Invoice to Adjuster

2.3.1 Screen Layout – returnBilling.shtml – see figure E.48

Mare to sep. figur

2.3.2 Return Billing

Figure E.48

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	
Amount	Output	15,2	Total Amount Due from Ins. Company	Total Amount Due	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Adjuster's last name + adjuster's first name.
Comments	Input	50	Reason Comments	NOTE	
Renter Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
Reason For Return	ComboBox	50	Reason For Return	standard message description	

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen from which they came. The invoice will still be displayed with the status of the invoice unchanged.

2.3.3.2 Return to Adjuster

When clicked, the user will return the invoice to the Adjuster for further instructions and the status will show returned invoice.

3.   Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1   Get Approved Invoices (Office Id)

The get approved invoices operation finds all the approved invoices for the specified office.

3.2   Get Invoice Detail (Invoice Number)

The get invoice detail operation gets the relevant invoice information for the specified invoice number.

3.3   Return Invoice to Approving Adjuster (Invoice Number, Reason Code)

The return invoice to approving adjuster operation marks the specified invoice so that the approving adjuster can review the invoice and re-approve it.

3.4   Pay Invoice (Invoice Number, Check Number)

The pay invoice operation records the check number specified by the adjuster against the specified invoice and marks the invoice as paid.

4.   Data Fields

4.1   Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1   accounting name

Entity	OFFDRB OFFICE DIRECTORY BRANCH MASTER
Column Name	acctg_nam
Label Name	Accounting Name
System Name	
Data Type	VARCHAR(8)
Attribute Definition	

4.1.2   action item complete date

Entity	ACTION ITEM
Column Name	actn_item_cmpl_dte
Label Name	action item complete date:
System Name	AITMCMPLDT
Data Type	DATE
Attribute Definition	The action item complete date is the date the action item was completed by an administrator or adjustor.

4.1.3   action item effective date

Entity	ACTION ITEM
Column Name	actn_item_eff_dte
Label Name	action item effective date:
System Name	AITMEFFDT
Data Type	DATE
Attribute Definition	The action item effective date is the date the action item will become effective.

4.1.4   action item status code

Entity	ACTION ITEM
Column Name	actn_item_stat_cde
Label Name	action item status code:
System Name	
Data Type	CHAR(6)
Attribute Definition	The action item status code defines the status of this action item. For example:

4.1.5   action item type code

Entity	ACTION ITEM
Column Name	actn_item_typ_cde
Label Name	action item type code:
System Name	
Data Type	DEC(3,0)
Attribute Definition	The action item type code defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors

	and administrators when contracting an insured with a replacement vehicle. For example: Closing an Of

4.1.6   action item type description

Entity	ACTION ITEM TYPE
Column Name	actn_item_typ_dsc
Label Name	action item type description:
System Name	
Data Type	CHAR(40)
Attribute Definition	The action item type description is a lexical definition of an action item type code which defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors and administrators when contracting an

4.1.7   Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.8   Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.9   ARMS Profile ID

Entity	ACTION ITEM
Column Name	ALCUID
Label Name	ARMS Profile ID
System Name	
Data Type	CHAR(5)
Attribute Definition	The ARMS Profile ID is the company identifier used to uniquely define an authorization.

4.1.10   assigned to adjustor code

Entity	ACTION ITEM
Column Name	assgn_to_adjr_cde
Label Name	Adjustor Code
System Name	AADJRCDE
Data Type	CHAR(10)
Attribute Definition	The assigned to adjustor code is the adjustor code of the administrator or adjustor's who is assigned the action item.

4.1.11 assigned to company identifier

Entity	ACTION ITEM
Column Name	assgn_to_cmpy_id
Label Name	ARMS Profile ID
System Name	ACMPYID
Data Type	CHAR(5)
Attribute Definition	The assigned to company identifier is the company identifier of the administrator or adjustor's who is assigned the action item.

4.1.12 Bill To %

Entity	ARM: Authorization(Claim Info)
Column Name	AZBTPC
Label Name	Bill To %
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.13 Branch

Entity	A4 Cross Reference
Column Name	br_id
Label Name	Branch:
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.14 check number

Entity	RENTAL INVOICE PAYMENT
Column Name	chk_nbr
Label Name	check number:
System Name	CHKNBR
Data Type	DEC(11,0)
Attribute Definition	

4.1.15 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.16 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code

	which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.17 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.18 company structure level code

Entity	ACTION ITEM
Column Name	cmpy_strct_lvl_cde
Label Name	company structure level code:
System Name	CMPYSLVLCD
Data Type	DEC(3,0)
Attribute Definition	The external organization structure level code identifies the kind or type of internal organizations of the external organizations which Enterprise Rent-A-Car does business with. Such as: Corporation, Branch Claims Office, Region, Area, Subregion, etc.

4.1.19 Customer Transaction ID

Entity	ACTION ITEM
Column Name	AZCUTI
Label Name	Customer Transaction ID
System Name	
Data Type	CHAR(20)
Attribute Definition	The Customer Transaction ID is the authorization transaction identifier which along with a company identifier uniquely define an authorization.

4.1.20 Date Of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date Of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.21 Dollars Per Day Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ$PDY
Label Name	Dollars Per Day Covered
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.22 End Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZENDT
Label Name	End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.23 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.24 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencie

4.1.25 Federal ID Number

Entity	A4 Invoice Header
Column Name	I1FETX
Label Name	Federal ID Number
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.26 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.27 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.28 Group

Entity	A4 Cross Reference
Column Name	grp_id
Label Name	Group Number
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.29 handled by adjustor code

Entity	ACTION ITEM
Column Name	handl_by_adjr_cde
Label Name	Adjustor Code
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handled by adjustor code is the adjustor code of the administrator or adjustor's who is handling the action item.

4.1.30 handled by company identifier

Entity	ACTION ITEM
Column Name	handl_by_cmpy_id
Label Name	ARMS Profile ID
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handled by company identifier is the company identifier of the administrator or adjustor's who is handling the action item.

4.1.31 handling for adjustor code

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_adtr_cde
Label Name	handling for adjustor code:
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handling for adjustor coder is the adjustor code of an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.32 handling for company identifier

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_cmpy_id
Label Name	handling for company identifier:

System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handling for company identifier is the company identifier used to uniquely identify an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.33 Insurance Claim Number

Entity	A4 Invoice Header
Column Name	I1CLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.34 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.35 Invoice Number

Entity	A4 Invoice Header
Column Name	I1INNO
Label Name	Invoice Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.36 Item Amount

Entity	A4 Invoice Detail
Column Name	I2IT$$
Label Name	Item Amount
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

4.1.37 Item Description

Entity	A4 Invoice Detail
Column Name	I2ITDS
Label Name	Item Description
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.38   Item Quantity

Entity	A4 Invoice Detail
Column Name	I2ITQY
Label Name	Item Quantity
System Name	
Data Type	DECIMAL(5)
Attribute Definition	

4.1.39   Item Rate

Entity	A4 Invoice Detail
Column Name	I2ITRT
Label Name	Item Rate
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

4.1.40   Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.41   Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.42   loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.43   Max $ Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ$MAX
Label Name	Max $ Covered
System Name	

Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.44 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.45 Record Add Date

Entity	A4 Invoice Header
Column Name	I1ADDT
Label Name	Record Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.46 related office identifier

Entity	ACTION ITEM
Column Name	rel_ofc_id
Label Name	related office identifier.
System Name	RELOFCID
Data Type	DEC(11,0)
Attribute Definition	The related office identifier is the identifier of the office responsible for the action item.

4.1.47 Request Type

Entity	A4 Cross Reference
Column Name	X4RSFG
Label Name	Request Type
System Name	
Data Type	CHAR(1)
Attribute Definition	

4.1.48 standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC
Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"

4.1.49   Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT
Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.50   State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.51   Status Code

Entity	ACTION ITEM TYPE
Column Name	XUSTCD
Label Name	Status Code
System Name	XUSTCD
Data Type	CHAR(1)
Attribute Definition	The status code is a code from the ARMS system which identifies whether an authorization is a reservation, a ticket, unauthorized, invoiced, paid, etc.

4.1.52   Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.53   Ticket Number

Entity	A4 Cross Reference
Column Name	X4TKNO
Label Name	Ticket Number
System Name	
Data Type	CHAR(6)
Attribute Definition	

4.1.54   Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL$$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.55 Total Amount Received

Entity	A4 Invoice Trailer
Column Name	I3RC$$
Label Name	Total Amount Received
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.56 Total Billed to Others

Entity	A4 Invoice Trailer
Column Name	I3OT$$
Label Name	Total Billed to Others
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.57 Total Ticket Charges

Entity	A4 Invoice Trailer
Column Name	I3TO$$
Label Name	Total Ticket Charges
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.58 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

5.   Questions and Answers

None.

Enterprise Rent-A-Car

Functional Design Specification
Reject an Invoice

Version 1.0

Last Saved: 6/29/00 9:35 AM

Revision History

Date	Issue	Description	Author
April 19, 2000	0.1	Initial Creation of Section 1.0	Brad Reel
April 24, 2000	0.2	Changes to reflect initial team review	Brad Reel
May 9, 2000	0.3	Included all subdocuments	Cindy Bastean
May 9, 2000	0.3	Added changes from Final Team Review, Removed subdocuments	Brad Reel, Deb Ealick, Anil Kabra, Cindy Bastean
May 16, 2000	0.4	Made changes per cross team QA	Deb Ealick, Cindy Bastean
June 8, 2000	0.5	Added Data Field Information	Cindy Bastean
June 30, 2000	1.0	Updated various parts of document	Brad Reel
September 14, 2000	1.0	Updated various parts of document	Brian Weingart

Table of Contents
Reject an Invoice

1. Reject An Invoice Use Case

1.1 Brief Description

The Reject an Invoice use case describes how the ADJUSTER would reject an invoice to Enterprise in the ARMS Web system.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use this use case to reject an invoice.

1.3 Pre-Conditions

- The ADJUSTER'S office must be set up for individual approval of invoices.
- The ADJUSTER must be set up to approve invoices.

1.4 Flow of Events

The Flow of Events will include the necessary steps for an ADJUSTER to reject invoices.

1.4.1 Activity Diagram — *see Figure E.49*

Reject an Invoice Activity Diagram

Figure E.49

More to sep. figure

\\FSCORP00\CORP_PUBLIC\APPS\#ARMS\WEB\APPLICATION\@DKB\ARMS WEB\RELEASE
ONE\BI-BILLING\AND INVOICING\B\-03-REJECT AN INVOICE\ACTBI-03-ACTIVITY
DIAGRAM.VSD

6/20/00

Confidential   Enterprise Rent-A-Car © 2000   2
http://intranet/dm2/ReadDocOrLink.ASP?FolderID=2703&DocID=10510

1.4.2 Basic Flow

1. The ADJUSTER will reject an invoice.
2. The system will prompt for reject confirmation.
3. The ADJUSTER will enter a reject reason for rejecting the invoice.
4. The ADJUSTER may enter comments to be added to the diary notes.
5. The ADJUSTER will submit the rejection to the system.
6. The system will display instructions for achieving resolution on the rejected invoice.
7. The ADJUSTER will acknowledge that they understand the instructions.
8. The system will update the ARMS Web database to reflect that the ADJUSTER rejected the invoice.
9. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Cancel Rejection

At steps two through seven of the Basic Flow, the ADJUSTER must have the ability to cancel the invoice rejection process. Canceling the rejection should return the ADJUSTER to the Invoicing Approval Screen or the Invoicing Individual Payment screen. The invoice that was to be rejected should be displayed. The status of the invoice should be unapproved.

1.4.3.2 No Reject Reason Given

At step three in the Basic Flow; if the ADJUSTER attempts to bypass entering a reject reason, they will be prompted to enter one. The ADJUSTER will not be allowed to complete the rejection process without providing a reject reason.

1.4.3.3 Short Pay

If the reject reason given in step three of the Basic Flow is a reason that requires a short pay, at step five of the Basic Flow the system will display a field for entry of the short pay amount. The ADJUSTER will not be allowed to complete the rejection process without providing an amount that will be paid.

1.5 Post-Conditions

- If the use case was successful the invoice will be marked rejected in the ARMS Web system.
- If the use case was unsuccessful, the status remains unchanged.

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 Invoices are Initially Auto Approved

If an ADJUSTER'S invoices are normally auto approved, functionality needs to exist to route invoices to them when they are returned to ADJUSTER from the PROCESSOR. This functionality will need to override the normal routing processes that exist at the office.

1.7 Extension Points

None.

2.   Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1   Reject Billing Reason

This screen will allow the user to begin the rejection process.

2.1.1   Screen Layout – Reject Billing Reason   *–see Figure E.50*

> *More to sep. figure*

Figure E.50

2.1.2   Reject Billing – Reject Billing Reason

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Amount	Output	10	Total Amount Due	CALCULATED	
Claim Number	Output	15	Claim Number	Insurance Claim Number	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Name of adjuster's to which the invoice is assigned
Comments	Input	50	Message Text	NOTE	
Renter's Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
Reason for Rejection	List Box	20	Rejection Reasons	standard message description	

2.1.3   Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 CONTINUE

The system will validate the input from the screen according to the listed business rules. If the validation passes, the rejection process will continue.

The following business rules that must be passed before the USER may continue to the next step in the rejection process are the following:

- A valid rejection reason must be selected from the drop down box

- If the rejection reason selected is "Other" a comment must be entered

2.1.3.2 CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen. The invoice will still be displayed with the status of the invoice unchanged.

2.2   Reject Billing Amount

2.2.1   Screen Layout – Reject Billing Amount — see Figure E.51

> More to <br> sx figure

Reject Billing

Reject Billing

You've chosen to reject the following invoice.

Adjuster's Name	Renter's Name	Claim Number	Amount
Warner, Kurt	Bamvakais, John	5696754621	$271.18

Amount you are paying: _____

To complete this process, please contact the rental branch location listed below:

Enterprise Rent-A-Car
600 New Haven Rd.
Charlotte, NC 28210
704-553-2001

Figure E.51

2.2.2   Reject Billing – Reject Billing Amount

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Output	15	Claim Number	Insurance Claim Number	
Amount	Output	15,2	Invoice Amount	Total Amount Due	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Name of adjuster's to which the invoice is assigned
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	User's Name	First Name + Last Name	Adjuster's last name + adjuster's first name. The name of the current adjuster in the system
	Output	30	Rental Location Address	Address Line + Address Line2	
	Output	30	Rental Location City, State and Zip	City + State + Zip Code	
	Output	15	Rental Location Telephone Number	Telephone Number	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Renter's Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
To complete this process, please contact the Enterprise Branch listed below:	Output	50	Rental Location Accounting Name	accounting name	

2.2.3   Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1   REJECT INVOICE

The system will validate the input from the screen. If the validation passes, the invoice will be marked as rejected and the Arms Web database will be updated. If an amount was entered in the "Amount you are paying" field, then the invoice should be marked short paid.

2.2.3.2   CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen. The invoice will still be displayed with the status of the invoice unchanged.

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Get Invoice Rejection Reasons (Company Id)

The get invoice rejection reasons gets the predefined rejection reasons for the company.

3.2 Reject Invoice (Invoice Number)

The reject invoice operation marks the specified invoice as rejected. The rejected invoice becomes an action item for the adjuster to handle.

4.   Data Fields

4.1   Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1   accounting name

Entity	OFFDRB OFFICE DIRECTORY BRANCH MASTER
Column Name	acctg_nam
Label Name	Accounting Name
System Name	
Data Type	VARCHAR(8)
Attribute Definition	

4.1.2   Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.3   Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.4   City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.5   external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.6   First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.7   First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.8   Insurance Claim Number

Entity	A4 Invoice Header
Column Name	I1CLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.9   Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.10   Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.11   standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC
Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific

	activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"

4.1.12   State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.13   Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.14   Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL$$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.15   Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

Enterprise Rent-A-Car

Functional Design Specification
Callbacks

Version 1.1

Last Saved: 8/17/00 3:12 PM

Revision History

Date	Issue	Description	Author
2000-07-06	0.1	Initial draft published to design team for review and comment.	Sean O'Donnell
2000-07-25	0.2	Incorporated the screen designs that developed by the Marketing group.	Sean O'Donnell
2000-08-18	1.1	Made revisions to the screens based on feedback from Marketing and the Build teams.	Sean O'Donnell

Callbacks

1. Callbacks

1.1 Brief Description

This use case describes the process that will perform repair facility callbacks in the ARMS Web system. USERs perform repair facility callbacks on each of the rental contracts that are set to expire in the near future (or have already expired), to proactively determine if rentals must be extended due to slippage in repair facility time estimates. The callback process in the ARMS Web system will retrieve each of the rental contracts that will expire in the user-defined period of time, and organize them by repair facility to allow the USER to make one phone call to inquire about the potentially multiple vehicles that the repair facility is responsible for.

1.2 Use Case Actors

All actors will use the use case to retrieve callback lists in the ARMS Web system. All of the following actors can be defined generically as a USER:

- **PROCESSOR**

- **ADJUSTER**

- **COMPANY MANAGER**

For the balance of this use case, all of the above actors will be referred to as USER.

1.3 Pre-Conditions

- The USER must be signed-on to the system.

1.4 Flow of Events

The Flow of Events includes all the steps necessary to retrieve and manage callbacks in the ARMS Web system.

1.4.1 Activity Diagram — see Figure E.52

Callbacks Activity Diagram

Figure E.52

More to say, figure
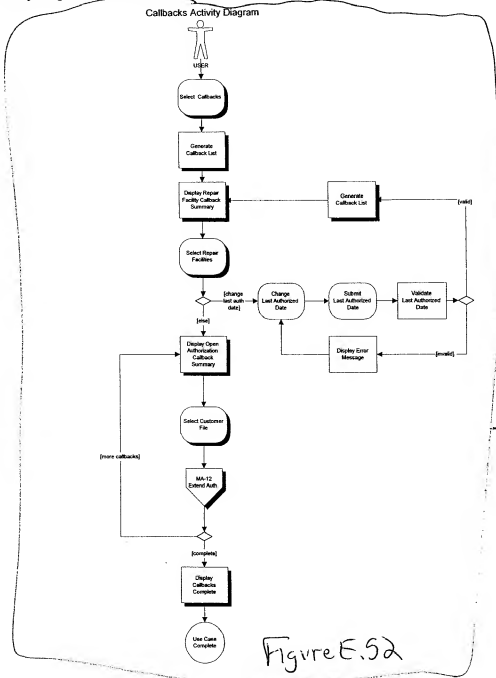
1.4.2 Basic Flow

The **Basic Flow** of the Callbacks use case includes all of the required activities for the USER to successfully generate and perform repair facility callbacks in the ARMS Web system.

1. The USER selects to perform callbacks from the reporting menu of top navigation.

2. The system generates a report of all open authorizations for the selected office that will expire the next day (have a last authorized day of tomorrow). This list will include any authorizations that have already expired, or will expire by the end of business on the following day.

3. The system displays a summary of repair facilities that have rentals expiring in the specified timeframe. The repair facility callback summary must consist of:

   - Repair Facility Name
   - Repair Facility Telephone Number
   - Number of Rental callbacks due to the Repair Facility

4. The USER selects one or more repair facilities from the repair facility callback summary.

5. The system displays a summary of the open authorizations that are set to expire for all selected repair facilities. The open authorization callback summary will consist of:

   - Renter Name
   - Year/Make/Model of the Renter's Vehicle
   - Driveable Flag (y/n)
   - Number of Days Behind
   - Authorized Days
   - Last Authorized Day

6. The USER will select a customer file from the list.

7. The USER will extend into use case MA-12 Extend Authorization. The USER will have the ability to extend, add notes, terminate or modify an authorization as proscribed in the MA-12 Extend Authorization use case. If callbacks still exist, the USER will be returned to Step 5 of the **Basic Flow** on completion of the MA-12 Extend Authorization use case.

   If all callbacks have been completed, the **Basic Flow** continues.

8. The system will display a screen to indicate that all repair facility callbacks for the office have been completed.

9. This ends this use case.

1.4.3 Alternative Flows

The **Alternative Flows** of this use case can occur when certain conditions exist or when specific USER feedback is provided.

1.4.3.1 Change Last Authorized Date

At Step 3 or Step 5 of the **Basic Flow**, the USER has the ability to change the last authorized day to any day in the future. The system will re-generate the callbacks list and the USER will be returned to Step 2 of the Basic Flow on submission of the new last authorized day.

1.4.3.2 Last Authorized Date Entered Invalid

In the Change Last Authorized Date **Alternative Flow**, if the last authorized date entered by the USER is invalid, the system will return to the beginning of the Change Last Authorized Date **Alternative Flow** and provide the USER with an error message.

  1.4.3.2.1 It will be considered invalid if the last authorized date entered is less than the current date.

1.5 Post-Conditions

- If successful, a callback list is created for the USER.

- If unsuccessful, the system state remains unchanged.

1.6   Special Requirements

None.

1.7   Extension Points

1.7.1   MA-12 Extend Authorization

At Step 7 of the Basic Flow, the USER will extend from the use case to the MA-12 Extend Authorization use case. This will allow the USER to update the open authorization with the results of the repair facility callback (e.g., extend, add notes, or terminate the rental authorization). On completion of the MA-12 Extend Authorization use case, the rules specified within the **Basic Flow** should be followed as to the next step in the process.

2.   Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1   Repair Facility Callback Summary

This screen provides the USER with a repair facility callback summary, and supports Step 3 of the **Basic Flow**.

2.1.1   Screen Layout   ~See Figure E.53

Figure E.53

↳ More
↓ to
sep, figure

Enterprise Rent-A-Car

Functional Design Specification
Reject an Invoice

Version 1.0

Last Saved: 6/29/00 9:35 AM

Revision History

Date	Issue	Description	Author
April 19, 2000	0.1	Initial Creation of Section 1.0	Brad Reel
April 24, 2000	0.2	Changes to reflect initial team review	Brad Reel
May 9, 2000	0.3	Included all subdocuments	Cindy Bastean
May 9, 2000	0.3	Added changes from Final Team Review, Removed subdocuments	Brad Reel, Deb Ealick, Anil Kabra, Cindy Bastean
May 16, 2000	0.4	Made changes per cross team QA	Deb Ealick, Cindy Bastean
June 8, 2000	0.5	Added Data Field Information	Cindy Bastean
June 30, 2000	1.0	Updated various parts of document	Brad Reel
September 14, 2000	1.0	Updated various parts of document	Brian Weingart

Table of Contents
Reject an Invoice

1.   Reject An Invoice Use Case

1.1   Brief Description

The Reject an Invoice use case describes how the ADJUSTER would reject an invoice to Enterprise in the ARMS Web system.

1.2   Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use this use case to reject an invoice.
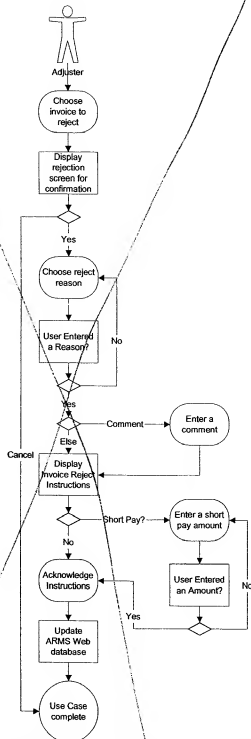
1.3   Pre-Conditions

- The ADJUSTER'S office must be set up for individual approval of invoices.
- The ADJUSTER must be set up to approve invoices.

1.4   Flow of Events

The Flow of Events will include the necessary steps for an ADJUSTER to reject invoices.

1.4.1   *Activity Diagram*

Reject an Invoice Activity Diagram

```
                              O
                             /|\
                             / \
                          Adjuster

                         ┌─────────┐
                         │ Choose  │
                         │invoice  │
                         │to reject│
                         └─────────┘

                         ┌─────────┐
                         │ Display │
                         │rejection│
                         │screen for│
                         │confirmation│
                         └─────────┘

                            Yes

                         ┌─────────┐
                         │ Choose  │
                         │ reject  │
                         │ reason  │
                         └─────────┘

                         ┌─────────┐
                         │User Entered│   No
                         │ a Reason? │
                         └─────────┘

                            Yes

                                   Comment ──── ┌─────────┐
                                                │ Enter a │
                            Else                │ comment │
                                                └─────────┘
                  Cancel
                         ┌─────────┐
                         │ Display │
                         │Invoice Reject│
                         │Instructions│
                         └─────────┘

                                 Short Pay? ──── ┌─────────┐
                                                 │Enter a short│
                            No                   │ pay amount │
                                                 └─────────┘

                         ┌─────────┐
                         │Acknowledge│          ┌─────────┐
                         │Instructions│         │User Entered│  No
                         └─────────┘            │an Amount?│
                                                └─────────┘
                         ┌─────────┐       Yes
                         │ Update  │
                         │ARMS Web │
                         │database │
                         └─────────┘

                         ┌─────────┐
                         │Use Case │
                         │complete │
                         └─────────┘
```

\\FSCORP00\CORP_PUBLIC\APPS\#ARMSWEB\APPLICATION@DKB\ARMS WEB\RELEASE
ONE\BI-BILLING AND INVOICING\BI-03-REJECT AN INVOICE\ACTBI-03-ACTIVITY
DIAGRAM.VSD

6/20/00

1.4.2   Basic Flow

1. The ADJUSTER will reject an invoice.
2. The system will prompt for reject confirmation.
3. The ADJUSTER will enter a reject reason for rejecting the invoice.
4. The ADJUSTER may enter comments to be added to the diary notes.
5. The ADJUSTER will submit the rejection to the system.
6. The system will display instructions for achieving resolution on the rejected invoice.
7. The ADJUSTER will acknowledge that they understand the instructions.
8. The system will update the ARMS Web database to reflect that the ADJUSTER rejected the invoice.
9. This ends the use case.

1.4.3   Alternative Flows

1.4.3.1   Cancel Rejection

At steps two through seven of the Basic Flow, the ADJUSTER must have the ability to cancel the invoice rejection process. Canceling the rejection should return the ADJUSTER to the Invoicing Approval Screen or the Invoicing Individual Payment screen. The invoice that was to be rejected should be displayed. The status of the invoice should be unapproved.

1.4.3.2   No Reject Reason Given

At step three in the Basic Flow; if the ADJUSTER attempts to bypass entering a reject reason, they will be prompted to enter one. The ADJUSTER will not be allowed to complete the rejection process without providing a reject reason.

1.4.3.3   Short Pay

If the reject reason given in step three of the Basic Flow is a reason that requires a short pay, at step five of the Basic Flow the system will display a field for entry of the short pay amount. The ADJUSTER will not be allowed to complete the rejection process without providing an amount that will be paid.

1.5   Post-Conditions

- If the use case was successful the invoice will be marked rejected in the ARMS Web system.
- If the use case was unsuccessful, the status remains unchanged.

1.6   Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1   Invoices are Initially Auto Approved

If an ADJUSTER'S invoices are normally auto approved, functionality needs to exist to route invoices to them when they are returned to ADJUSTER from the PROCESSOR. This functionality will need to override the normal routing processes that exist at the office.

1.7   Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Reject Billing Reason

This screen will allow the user to begin the rejection process.

2.1.1 Screen Layout – Reject Billing Reason

2.1.2 Reject Billing – Reject Billing Reason

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Amount	Output	10	Total Amount Due	CALCULATED	
Claim Number	Output	15	Claim Number	Insurance Claim Number	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Name of adjuster's to which the invoice is assigned
Comments	Input	50	Message Text	NOTE	
Renter's Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
Reason for Rejection	List Box	20	Rejection Reasons	standard message description	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 CONTINUE

The system will validate the input from the screen according to the listed business rules. If the validation passes, the rejection process will continue.

The following business rules that must be passed before the USER may continue to the next step in the rejection process are the following:

- A valid rejection reason must be selected from the drop down box

- If the rejection reason selected is "Other" a comment must be entered

2.1.3.2 CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen. The invoice will still be displayed with the status of the invoice unchanged.

2.2   Reject Billing Amount

2.2.1   Screen Layout – Reject Billing Amount

Reject Billing

Reject Billing

You've chosen to reject the following invoice.

| Adjuster's Name | Renter's Name | Claim Number | Amount |
| Warner, Kurt | Bamvakais, John | 5698754821 | $271.18 |

Amount you are paying:

To complete this process, please contact the rental branch location listed below:

Enterprise Rent-A-Car
600 New Haven Rd.
Charlotte, NC 28210
704-553-2001

2.2.2   Reject Billing – Reject Billing Amount

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Output	15	Claim Number	Insurance Claim Number	
Amount	Output	15,2	Invoice Amount	Total Amount Due	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Name of adjuster's to which the invoice is assigned
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	User's Name	First Name + Last Name	Adjuster's last name + adjuster's first name. The name of the current adjuster in the system
	Output	30	Rental Location Address	Address Line + Address Line2	
	Output	30	Rental Location City, State and Zip	City + State + Zip Code	
	Output	15	Rental Location Telephone Number	Telephone Number	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Renter's Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
To complete this process, please contact the Enterprise Branch listed below:	Output	50	Rental Location Accounting Name	accounting name	

2.2.3   Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 REJECT INVOICE

The system will validate the input from the screen. If the validation passes, the invoice will be marked as rejected and the Arms Web database will be updated. If an amount was entered in the "Amount you are paying" field, then the invoice should be marked short paid.

2.2.3.2 CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen. The invoice will still be displayed with the status of the invoice unchanged.

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Get Invoice Rejection Reasons (Company Id)

The get invoice rejection reasons gets the predefined rejection reasons for the company.

3.2 Reject Invoice (Invoice Number)

The reject invoice operation marks the specified invoice as rejected. The rejected invoice becomes an action item for the adjuster to handle.

4.   Data Fields

4.1   Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1   accounting name

Entity	OFFDRB OFFICE DIRECTORY BRANCH MASTER
Column Name	acctg_nam
Label Name	Accounting Name
System Name	
Data Type	VARCHAR(8)
Attribute Definition	

4.1.2   Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.3   Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.4   City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.5   external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.6   First Name

Entity	ARM: Adjustor Master	
Column Name	ALFSNM	
Label Name	First Name	
System Name		
Data Type	CHAR(15)	
Attribute Definition		

4.1.7   First Name

Entity	ARM: Renter Detail	
Column Name	RKFSNM	
Label Name	First Name	
System Name		
Data Type	CHAR(15)	
Attribute Definition		

4.1.8   Insurance Claim Number

Entity	A4 Invoice Header	
Column Name	I1CLNO	
Label Name	Insurance Claim Number	
System Name		
Data Type	CHAR(20)	
Attribute Definition		

4.1.9   Last Name

Entity	ARM: Adjustor Master	
Column Name	ALLSNM	
Label Name	Last Name	
System Name		
Data Type	CHAR(20)	
Attribute Definition		

4.1.10   Last Name

Entity	ARM: Renter Detail	
Column Name	RKLSNM	
Label Name	Last Name	
System Name		
Data Type	CHAR(20)	
Attribute Definition		

4.1.11   standard message description

Entity	STANDARD MESSAGE	
Column Name	std_msg_dsc	
Label Name	standard message description:	
System Name	STDMSGDSC	
Data Type	CHAR(50)	
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific	

	activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"

4.1.12 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.13 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.14 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL$$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.15 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

Enterprise Rent-A-Car

Functional Design Specification
Generate Personal Report

Version 1.11

Last Saved: 8/16/00 3:01 PM

Revision History

Date	Issue	Description	Author
	0.1	Initial draft published to design team for review and comment.	Sean O'Donnell
2000-07-03	0.2	Revisions to the Reporting Specification made based on feedback from the business, user groups, and additional functional requirement definition	Sean O'Donnell
2000-07-21	0.3	Added screen design section to the document based on the screen concepts designed by Marketing	Sean O'Donnell
2000-07-24	1.0	Version published to design team for construction.	Sean O'Donnell
2000-08-09	1.1	Version updated to include revisions and comments made by the business and build teams. Added the ability to filter report views by claim type. Removed all reference to multi-company users.	Sean O'Donnell

Table of Contents

Generate Personal Report

1. Generate Personal Report

1.1 Brief Description

This use case describes how a USER would generate a report on their personal rental management activity. Personal reports allow the USER access to reporting on <u>only their own rental management activity</u>, which allows the USER to review their own performance and secures access to the rental management reports of others.

1.2 Use Case Actors

All actors will use the use case to generate personal reports in the ARMS Web system. All of the following actors can be defined generically as a USER:

- **ADJUSTER**
- **PROCESSOR**
- **COMPANY MANAGER**

For the balance of this use case, all of the above actors will be referred to as USER.

1.3 Pre-Conditions

- The USER must be signed-on to the system.

1.4 Flow of Events

The Flow of Events includes all the steps necessary to generate personal reports in the ARMS Web system.

1.4.1   Activity Diagram — see figure E.54

Generate Personal Report Activity Diagram

USER

Select Personal Report

Generate Report

Display Report

Select Report Date Range

[change date range]

Select Ticket

[select ticket]

[closed ticket]

Display Closed Ticket

RP-03 Add/Edit Custom

Select Add/Edit Custom

[add/edit custom]

Sort Report View Ascending

[new sort]

Select Column Heading

[select sort]

[current sort]

Sort Report View Descending

[change report view]

Select Report View

[else]

[select open ticket]

Select Ticket

MA-13 Change Auth.

[else]

[else]

[else]

[select download]

Select Download Report

Publish Comma Delimited

[else]

Use Case Complete

Figure E.54

1.4.2   Basic Flow

The **Basic Flow** of the Generate Personal Report use case includes all of the required activities for the USER to successfully generate and view a standard personal report in ARMS Web.

1. The USER selects to generate a personal report from the top navigation bar.

2. The system generates the report for the specific USER. The report should provide rental management reports for the signed-in USER. The default report view to display to the USER will be the Open Ticket Detail view (see section 1.6.1 of the Special Requirements section on page 5 for further definition).

3. The system displays the report to the USER.

4. This ends this use case.

1.4.3   Alternative Flows

The **Alternative Flows** of this use case can occur when certain conditions exist or when specific USER feedback is provided. The **Alternative Flows** are optional and only occur if the conditions specified are met.

1.4.3.1   Change Report View

At Step 3 of the **Basic Flow**, the USER will have the ability to change the report 'view'[1]. Report 'views' change the type of information that is presented to the USER, but maintains the same or similar scope. For example, the USER can select to change to a closed ticket detail view from the open ticket detail view, but the information presented is limited (scoped) to the rental management activity of the USER.

If the USER selects to change the report view, the system will return to Step 2 of the **Basic Flow** and re-generate the report to build the requested view.

1.4.3.2   Change Closed Ticket Date Range

At Step 3 of the **Basic Flow**, if the current report view is a closed ticket report, the USER will have the ability to change the date range of the report. The available date range for closed ticket reporting will be a rolling 13-month period (to be expanded to 24-months in future releases) with the current month inclusive. The default date range that will be presented to the USER will be the current and previous two (2) months. The USER will have the ability to select Month/Year to begin and end the date range for the closed ticket report. The USER will <u>not</u> have the ability to select specific days within a month as part of the date range.

If the USER selects a new date range for the closed ticket report view, the system will return to Step 2 of the **Basic Flow** and re-generate the report to build the USERs closed ticket report for the selected date range.

1.4.3.3   Select Open Ticket from Open Ticket Detail Report

At Step 3 of the **Basic Flow**, if the current report view is an open ticket detail report, the USER will have the ability to select a report line item to view the details of the open ticket customer file. When selected, the system will present the USER with the customer file that corresponds to the selected open ticket. The USER will be allowed to modify and submit changes to the customer file (as proscribed in use case MA-13 Change Authorization). Once activity on the customer file is complete, the USER should be returned to the open ticket detail report (Step 3 of the **Basic Flow**).

---

[1] Report views are covered in more detail in Section 1.6 Special Requirements.

1.4.3.4 Select Closed Ticket from Closed Ticket Detail Report

At Step 3 of the **Basic Flow**, if the current report view is a closed ticket detail report, the USER will have the ability to select a report line item to view the details of the closed ticket customer file. When selected, the system will present the USER with the closed customer file that corresponds to the selected closed ticket. The USER will be allowed to view/print the details of the closed ticket, but will not have the ability to modify or change the ticket information. From the closed customer file, the USER will be returned to the closed ticket detail report (Step 3 of the **Basic Flow**).

1.4.3.5 Sort Report

At Step 3 of the **Basic Flow**, the USER will have the ability to select any report column heading to have the report sorted by the selected column. If the USER selects a column heading, the system must sort the report by the selected column heading in ascending order. The USER will have the ability to toggle between ascending and descending sort order by re-selecting the currently sorted column. For example, if the USER wanted their report view to be sorted by *Renter Name*, clicking on the column would cause the report view to be sorted ascending by renter last name. If the USER would like to reverse the sort order to descending, selecting the column heading again would allow the report to be resorted descending by renter last name.

The system will return the USER to Step 3 of the **Basic Flow** on completion of this **Alternative Flow**, with the report view resorted according to the USER request.

1.4.3.6 Add/Edit Custom View

At Step 3 of the **Basic Flow**, the USER will have the ability to add or edit a custom report view. If the USER selects to add a report view, the system will extend to the RP-03 Add/Edit Custom View use case to define a new custom report layout.

If the USER is viewing a custom report, they will have the ability to edit the custom view by selecting an 'edit' option. When a user requests to edit a custom report layout, the system will extend to the RP-03 Add/Edit Custom View use case and pre-fill all corresponding fields with the currently selected parameters for the custom layout.

On completion of the use case extension, the USER will be returned to Step 2 of **Basic Flow** in this use case and be presented with the custom report layout that was defined/modified.

1.4.3.7 Select Download Report

At Step 3 of the **Basic Flow**, the USER will have the ability to download the current report view to a comma-delimited file. If the USER selects to download a comma-delimited version of the report, the system must publish a comma-delimited file that includes all of the data within the columns of the current report view. The comma-delimited file should include column headings for each of the columns of data provided to the USER. The comma-delimited file must also include report header information that includes:

- Report View (open ticket detail/closed ticket detail)
- Name of the Adjuster
- Date and time the report was generated

The system should return the USER to the report view (Step 3 of the **Basic Flow**) once a report has been successfully downloaded.

1.5   Post-Conditions
- If successful, a standard report is created for the USER.
- If unsuccessful, the system state remains unchanged.

1.6   Special Requirements

The special requirements for this use case define all of the personal report 'views' that are available to the USER. This list of personal report views may be expanded at a later date to include additional information from the ARMS/400 reporting detail files, but only these views are anticipated for the initial release.

1.6.1   Open Ticket Detail View

The Open Ticket Detail View provides the USER with columns of data on all currently open tickets under their management. The Open Ticket Detail report will display the following information to the user:

1. Renter Name
2. Claim Number
3. Claim Type
4. Authorized Rate*
5. Authorized Days*
6. Rental Days*
7. Number of Days Behind*
8. Number of Extensions*
9. Surcharges (Y/N)
10. Authorized Amount*

Specific rules that must apply to the Open Ticket Detail report view are outlined in the sections below;

1.6.1.1 Data Columns in the Open Ticket Detail View should be presented in the order defined above. For example, renter name belongs in column 1 of the Open Ticket Detail report.

1.6.1.2 All numeric fields should have averages provided at the foot of each corresponding column. Numeric fields are indicated with an asterisk (*) in the list above.

1.6.1.3 The default sort for the Open Ticket Detail view must be by the Number of Days Behind field, with open tickets that are the farthest behind presented at the top of the list.

1.6.1.4 Any open tickets that have a value greater than zero (0) in the Number of Days Behind field should be highlighted to the USER.

1.6.1.5 The report must include a count of the total number of contracts in the list.

1.6.1.6 The report view must include report header information (in both screen and downloaded versions) that includes:

- the type/view of report (open ticket detail)
- the name of the USER for whom the report was generated
- the date/time the open ticket report was generated

1.6.2   Closed Ticket Detail View

The Closed Ticket Detail View provides the USER with columns of data on closed ticket activity for the currently selected date range (the default date range is the current plus previous two (2) months). The Closed Ticket Detail report will display the following information to the user:

1. Renter Name
2. Claim Number
3. Claim Type
4. Authorized Rate*
5. Authorized Days*
6. Billed Days*
7. Number of Extensions*
8. Total Charges*
9. Amount Received*
10. Billed Amount*

Specific rules that must apply to the Closed Ticket Detail report view are outlined in the sections below;

1.6.2.1 Data Columns in the Closed Ticket Detail View should be presented in the order defined above. For example, renter name belongs in column 1 of the Closed Ticket Detail report.

1.6.2.2 All numeric fields should have averages provided at the foot of each corresponding column. Numeric fields are indicated with an asterisk (*) in the list above.

1.6.2.3 The default sort for the Closed Ticket Detail view must be by the Claim Number *field.*

1.6.2.4 The report must include a count of the total number of contracts in the list.

1.6.2.5 The report view must include report header information (in both screen and downloaded versions) that includes:
- *the type/view of report view (closed ticket detail)*
- *the name of the USER for whom the report was generated*
- *the date/time the open ticket report was generated*

1.6.3   Custom Report Views

The USER will have the ability to define their own custom report views through the RP-03 Add/Edit Custom View use case. These custom views are accessible from the Personal Reporting module of ARMS Web.

1.6.4   Report View Management

The system will present all of the records in a report result set on a single page, and the USER will scroll through the results to find specific records. Report views will <u>not</u> be presented in paging format (e.g., forcing the USER to review the Next 25 of 427 records).

1.7   Extension Points

This section describes the extension points of this use case.

1.1.1   MA-13 Change Authorization

If the USER selects a line item from the Open Ticket Detail report view, the USER will extend into the MA-13 Change Authorization use case (see the Select Open Ticket from Open Ticket Detail Report **Alternative Flow** on page 3 for additional detail). The USER will have the ability to make any changes or updates that their security level allows, and have the opportunity to return to this use case without making any changes to the open ticket. On completion of activity in the MA-13 Change Authorization use case, the USER will be returned to Step 3 of the **Basic Flow** within this use case (be presented with the Open Ticket Detail report).

1.1.2   RP-03 Add/Edit Custom View

If the USER selects to add or edit a custom view, the USER will extend into the RP-03 Add/Edit Custom View use case (see the Add/Edit Custom View Alternative Flow on page 4 for additional detail). The USER will define or modify their custom report layout and be returned to Step 2 of the **Basic Flow** within this use case.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Personal Report Template Screen

This screen provides the template to build personal report 'views', and supports Step 3 of the **Basic Flow**.

2.1.1 Screen Layout — see Figure E.55

Figure E.55

2.1.2 Screen Field Definition

Screen Label	Type	Length	Data Field	Screen Specific Rule
Office	Combo Box		Branch claims office	This combo list should include all of the offices for the currently active company that the USER is assigned to. If the value of this field is changed, the system should automatically refresh the screen with the current report view for the newly selected office.
Handling for	Output Text		Handling for	For personal reports, this value should always be 'Yourself'.
	Output Text		<Report By>	The <report by> field is a place holder in the header of the report view. For personal reports, this placeholder should be populated with the name of the user that is being reported on (i.e., the name of the user that requested the report).

Screen Label	Type	Length	Data Field	Screen Specific Rule
	Output Text		\<Time/Date Stamp>	The \<time/date stamp> field is a placeholder in the header of the report view. For personal reports, this placeholder should be populated with the date and time that the report was generated.
	Output Text		\<Report Type>	The \<report type> field is a placeholder in the header of the report view. For personal reports, this placeholder should be populated with the name of the current report view (e.g., Open Ticket Detail, Custom View 1)
\<Column Heading 1 through X>	Output Text		\<Data Columns 1 through X>	The data columns of the report should correspond to the data columns defined for the selected report view (either static or custom report view). The data columns should be presented in the sequence that they are defined.
Total	Output Text		Number of Customer Files	The total field should include the total number of contracts/customer files in the report.
Select a view	Combo Box		Report view selection	The 'select a view' combo box should include the names of all report views that are available to the user. This includes all pre-defined (e.g., Open Ticket Detail) and user-defined custom views. There should be an additional option to 'Add a custom view…'. If selected, the system should redirect the user to the Add/Edit Custom View screen in the RP-03 Add/Edit Custom View specification.
Show Only	Combo Box		Claim Type Filter	The 'show only' combo box should include the following values: • All Claim Types (default) • Insured Claim Types • Claimant Claim Types • Uninsured Claim Types • Theft Claim Types When selected, the report should filter the records to display in the requested report view according to the selection in this combo box. For example, if the selection in the 'show only' field were 'Insured Claim Types', the report view would only include records that have a Claim Type of 'Insured.

Screen Label	Type	Length	Data Field	Screen Specific Rule
From	Combo box		Closed ticket report from date	The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'January 2000'. The default value should be 2 months prior to the current month.
To	Combo box		Closed ticket report to date	The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'July 2000'. The default value should be the current month.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Choose a different report

The 'Choose a different report' screen function provides the USER with a hyperlink to the View a Different Report section of the Personal Report Template screen. The 'Choose a different report' screen function must be at or near the header of the report.

2.1.3.2 Go to Report Averages

The 'Go to Report Averages' screen function provides the USER with a hyperlink to the bottom of the report to review the averages for each of the numeric columns in the report view. The 'Go to Report Averages' hyperlink must be at or near the header of the report.

2.1.3.3 Column Heading Sort

The 'Column Heading Sort' screen function allows the USER to click on any column heading and have the current report view sorted by the selected column. On initial selection of a column heading, the system will resort the report view by the column selected in ascending order. If the sorted column is selected by the USER, the system will resort the report in descending order.

2.1.3.4 Download this report

The 'Download this Report' screen function allows the USER to click on a hyperlink and download a comma-delimited copy of the current report view. The downloaded copy must include:

     ❖   Report Header Information

         ➢   Name of the Report View
         ➢   Name of the Person
         ➢   Date and Time that the Report Was generated

     ❖   Report View Column Headings

❖ Report View Records

2.1.3.5 View Report

The 'View Report' screen function allows the USER to submit a request for a different type and/or date range of the report view. The system will refresh the screen with updated report view information when this screen function is invoked.

2.1.3.6 Edit Custom View

The Edit Custom View screen function is available only in cases that the USER has a custom defined view active. If the USER selects the Edit Custom View hyperlink, the system will present the USER with the Add/Edit Custom View screen and pre-populate the screen with the custom view definition. This will allow the USER to edit the custom views that they have previously defined.

See Figures E.56(a)-(c)

Welcome to the
Automated Rental Management Syste

create a
RESERVATION | find a CUSTOMER | action items | completed actions | reports | my prof

Claims Office: 003   Handling for: Yourself

Authorize Direct Bill: for Reed, Keith   Claim no. 123-9829
CUSTOMER FILE

Direct Bill Requested for: Claim Number: 123-9829   **Claim Type:** Insured

_____ days @ Economy/18.99   VIEW CARS   **Note to Enterprise:**

Policy: Daily rate/   Please chose a rate.
Maximum dollars

Direct Bill%: 100   **Note to Self Only:**

Vehicle Condition: Please select a condition

Date of Loss: September 20 2000

Date Rental Needed: September 22 2000

Insured Name: Last: _____   First: _____   *More to sep figure w/next page*

Messages:

Go to Notebook

[Change or Add]
RENTER INFORMATION:
Keith Reed   Home: (314)555-3876
                                    Work: Work: N/A

                                    Email: N/A

RENTAL INFORMATION:
Enterprise Rent-A-Car Location:
ENTERPRISE RENT-A-CAR
3725 BOGEY RD
SAINT CHARLES MO 633033105
6369463010
ADDITIONAL CLAIM INFORMATION:
Insured Name: N/A   **Repair Facility:**
Owner's vehicle: N/A   N/A
Date of Loss: 9/20/00

Date of Loss: 9/20/00
Type of Loss:
NOTEBOOK:

● top of page

Figure F.56(a)

More to
exp. figure w/
previous
page

Welcome to the
Automated Rental Management Syste

create a
RESERVATION | find a CUSTOMER | action items | completed actions | reports | my profile

Claims Office: 003   Handling for: Yourself

Extend Rental: for Scott Clinton Claim no. 615-3456
CUSTOMER FILE

1 of

Extension requested for: **Note to Enterprise:**

3 additional authorized days @ Compact/20.99   VIEW CARS

Messages: **Note to Self:**
Go to Notebook

Current Rental Status:
Rental Start Date: 9/22/00   **Rental Location:**
Last authorized ending date: 9/26/00   ENTERPRISE RENT-A-CAR
Authorized to date: 4   (314)918-1300
Charges to Date: $83.96*   **Repair Facility:**
Direct Bill %:   100   Owner's vehicle:
                                                   Vehicle Condition : Driveable
*Does not include taxes and surcharges
                                                   ☐ **Extend this rent**

[Change or Add]

RENTER INFORMATION:

Scott, Clinton   Home: (314)555-2345
                                   Work: N/A
                                   Email: N/A

RENTAL INFORMATION:
Current Class: Compact   **Enterprise Rent-A-Car Location:**
Additional Charges: None   ENTERPRISE RENT-A-CAR
Direct Bill %: 100   2229 S BRENTWOOD BLVD
Rental Date: 9/22/00   SAINT LOUIS MO 631441832
Start Date: 9/21/00   (314)918-1300

ADDITIONAL CLAIM INFORMATION:
Claim Number: 615-3456
Claim Type: Claimant   **Repair Facility:**
Insured Name:
Owner's vehicle:
Date of Loss: 9/21/00
Type of Loss: Driveable
Policy: Daily rate/
Maximum dollars:

NOTEBOOK:

○ top of page

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Figure E.56(b)

More to
sep. figure
together
w/previous
page

Welcome to the
Automated Rental Management System

create a
RESERVATION   find a
CUSTOMER   action items   complete action   reports   my prof

Claims Office: 003   Handling for: Yourself

Personal Reports: for <Report By> as of <Time/Date Stamp>

<Report Type>
Choose a different report

[Click on the column heading to sort] ⊕ Go to Report Totals

Renter Name	Claim Number	Claim Type	Billed Days	Authorized Days	Number of Extensions	Authorized Rate	Amount Received
Walker, L	12345678901234567890	Insured	15	13	2	20.00	YES
Oquendo, J	12345678901234567891	Insured	13	12	1	25.00	YES
Griffey Jr., K	12345678901234567890	Claimant	10	13	0	16.99	NO
McGwire, M	12345678901234567892	Uninsured	5	12	0	19.99	NO
Lankford, R	12345678901234567891	Claimant	7	0	0	23.99	YES
Jordan, B	12345678901234567891	Claimant	8	15	0	21.99	NO

Totals 6 Customer Files   **Averages** 7.16   13.33   .33   0.5

⊕ top of page   *Excludes taxes and governmen

Downloa

Choose a different report:

Select a view: Open Ticket Summary

For Closed Tickets, please select a time period:

From: January 2000

To: March 2000

Move to sip figure (

⊕ top of page

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Figure E.56(c)

Enterprise Rent-A-Car

Functional Design Specification
Generate Management Report

Version 1.11

Last Saved: 8/16/00 3:19 PM

Revision History

Date	Issue	Description	Author
	0.1	Initial draft published to design team for review and comment.	Sean O'Donnell
2000-07-06	0.2	Revisions to the Reporting Specification made based on feedback from the business, user groups, and additional functional requirement definition	Sean O'Donnell
2000-07-21	0.3	Added screen design section to the document based on the screen concepts designed by Marketing	Sean O'Donnell
2000-07-24	1.0	Version published to the build team for construction.	Sean O'Donnell
2000-08-09	1.1	Updated the specification based on comments from the business and build teams. Added the ability to filter report views by claim type. Removed all reference to multi-company users.	Sean O'Donnell

Table of Contents

Generate Management Report

1. Generate Management Report

1.1 Brief Description

This use case describes how a USER would request and generate management reports using the on-line reporting functionality of ARMS Web. On-line management reports provide real-time access to open and closed ticket information, which provides the management team of our customers with a tool to effectively monitor rental management statistics. Using the on-line reporting functionality, USERs can request and receive summarized and detailed rental management reports on their Office, on Adjusters within an office, or on the Repair Facilities that are trading partners of a particular office.

NOTE: The on-line reporting functionality of ARMS Web provides ARMS ticket data only. ARMS and Non-ARMS reporting is available through the monthly L480 report.

1.2 Use Case Actors

All actors will use the use case to generate management reports in the ARMS Web system. All of the following actors can be defined generically as a USER:

- **ADJUSTER** – Adjusters may be granted the authority to access management reports in their user profile[1].

- **COMPANY MANAGER** – All users that are identified to the system as managers will have access rights to the management reporting functionality.

For the balance of this use case, all of the above actors will be referred to as USER.

1.3 Pre-Conditions

- The USER must be signed-on to the system.
- The USER must have the authority to access management reports.

1.4 Flow of Events

The Flow of Events includes all the steps necessary to generate management reports in the ARMS Web system.

---

[1] Users may be granted access to management reporting capabilities through their user profile, even if they are not considered 'managers' in the ARMS Web system.

1.4.1 Activity Diagram -- see Figure E.57

Generate Management Report Activity Diagram
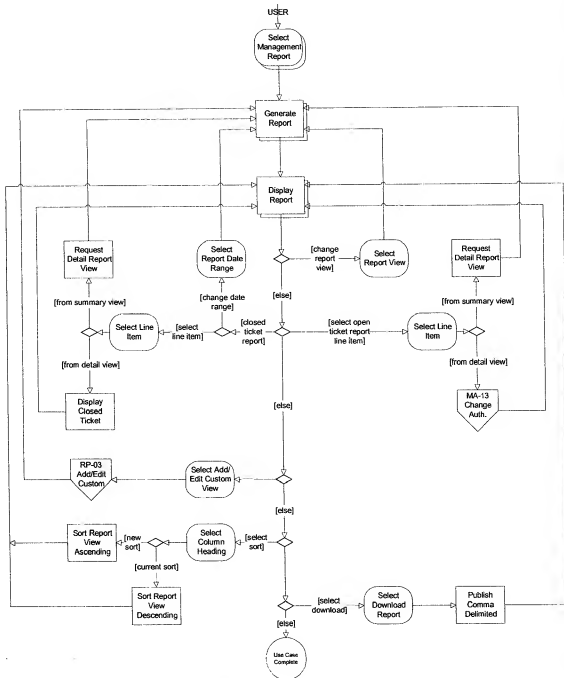
Figure E.57

1.4.2 Basic Flow

The **Basic Flow** of the Generate Management Report use case includes all of the required activities for the USER to successfully generate and view a management report using the on-line reporting functionality in ARMS Web.

1. The USER selects to generate a management report from top navigation.

2. The system generates a Closed Ticket Summary report by Adjuster for the USER. Management reporting USERs will have the ability to request additional summary <u>or</u> detail reports for:

   a. The office as a whole (by Office)

   b. The adjusters within an office (by Adjuster)

   c. The repair facilities doing business with a claims office (by Repair Facility)

3. The system displays the report to the USER.

4. This ends this use case.

1.4.3 Alternative Flows

The **Alternative Flows** of this use case can occur when certain conditions exist or when specific USER feedback is provided.

1.4.3.1 Change Report View

At Step 6 of the **Basic Flow**, the USER will have the ability to change the report 'view'[2]. Report 'views' change the type of information that is presented to the USER, but maintains the same or similar scope.

If the USER selects to change the report view, the system will return to Step 5 of the **Basic Flow** and re-generate the report to build the requested view. NOTE: The USER may also change the **Report By** criteria to request a new report view (e.g., request a report by Adjuster, Office, or Repair Facility).

1.4.3.2 Change Closed Ticket Date Range

At Step 6 of the **Basic Flow**, if the current report view is a closed ticket report, the USER will have the ability to change the date range of the report. The available date range for closed ticket reporting will be a rolling 13-month period (to be expanded to 24-months in future releases) with the current month inclusive. The default date range that will be presented to the USER will be the current and previous two (2) months. The USER will have the ability to select Month/Year to begin and end the date range for the closed ticket report. The USER will <u>not</u> have the ability to select specific days within a month as part of the date range.

If the USER selects a new date range for the closed ticket report view, the system will return to Step 5 of the **Basic Flow** and re-generate the report to build the USERs closed ticket report for the selected date range.

This applies to both summary and detail views of closed ticket reports.

---

[2] Report views are covered in more detail in Section 1.6 Special Requirements.

1.4.3.3 Select Summary Line Item from Open Ticket Summary Report

At Step 6 of the **Basic Flow**, if the current report view is an open ticket summary report, the USER will have the ability to select a report line item, which will trigger a request for a more detailed report for the selected item. For example, if the current view were an Open Ticket Summary for Adjusters within an office (Open Summary by Adjuster), the USER would have the ability to select an adjuster from the summarized report and review the Open Ticket Detail report for that adjuster. This 'drill-down' capability must be available for all report types (by Office, by Adjuster, by Repair Facility).

If the USER selects a line item from a summary report view, the system will return to Step 5 of the **Basic Flow** and generate the Open Ticket Detail report view for the selected item. From the Open Ticket Detail, the USER will have the ability to return to the Open Ticket Summary or to continue reviewing the Open Ticket Detail report views for each adjuster/repair facility within the office.

1.4.3.4 Select Open Ticket from Open Ticket Detail Report

At Step 6 of the **Basic Flow**, if the current report view is an open ticket detail report, the USER will have the ability to select a report line item to view the details of the open ticket customer file. When selected, the system will present the USER with the customer file that corresponds to the selected open ticket. The USER will be allowed to modify and submit changes to the customer file (as proscribed in use case MA-13 Change Authorization). Once activity on the customer file is complete, the USER should be returned to the open ticket detail report (Step 6 of the **Basic Flow**).

1.4.3.5 Select Summary Line Item from Closed Ticket Summary Report

At Step 6 of the **Basic Flow**, if the current report view is a closed ticket summary report, the USER will have the ability to select a report line item, which will trigger a request for a more detailed report for the selected item. For example, if the current view were a Closed Ticket Summary for Repair Facilities within an office (Closed Summary by Repair Facility), the USER would have the ability to select a repair facility name from the summarized report and review the Closed Ticket Detail report for that repair facility. This 'drill-down' capability must be available for all report types (by Office, by Adjuster, by Repair Facility).

If the USER selects a line item from a summary report view, the system will return to Step 5 of the **Basic Flow** and generate the Closed Ticket Detail report view for the selected item. From the Closed Ticket Detail, the USER will have the ability to return to the Closed Ticket Summary or to continue reviewing the Closed Ticket Detail report views for each adjuster/repair facility within the office.

1.4.3.6 Select Closed Ticket from Closed Ticket Detail Report

At Step 6 of the **Basic Flow**, if the current report view is a closed ticket detail report, the USER will have the ability to select a report line item to view the details of the closed ticket customer file. When selected, the system will present the USER with the closed customer file that corresponds to the selected closed ticket. The USER will be allowed to view/print the details of the closed ticket, but will not have the ability to modify or change the ticket information. From the closed customer file, the USER will be returned to the closed ticket detail report (Step 6 of the **Basic Flow**).

1.4.3.7 Sort Report

At Step 6 of the **Basic Flow**, the USER will have the ability to select any report column heading to have the report sorted by the selected column. If the USER selects a column heading, the system must sort the report by the selected column heading in ascending order. The USER will have the ability to toggle between ascending and descending sort order by re-selecting the

currently sorted column. For example, if the USER wanted their report view to be sorted by *Renter Name*, clicking on the column would cause the report view to be sorted <u>ascending</u> by renter last name. If the USER would like to reverse the sort order to <u>descending</u>, selecting the column heading again would allow the report to be resorted descending by renter last name.

The system will return the USER to Step 6 of the **Basic Flow** on completion of this **Alternative Flow**, with the report view resorted according to the USER request.

1.4.3.8 Add/Edit Custom View

At Step 6 of the **Basic Flow**, the USER will have the ability to add or edit a custom report view. If the USER selects to add a report view, the system will extend to the RP-03 Add/Edit Custom View use case to define a new custom report layout.

If the USER is viewing a custom report, they will have the ability to edit the custom view by selecting an 'edit' option. When a user requests to edit a custom report layout, the system will extend to the RP-03 Add/Edit Custom View use case and pre-fill all corresponding fields with the currently selected parameters for the custom layout.

On completion of the use case extension, the USER will be returned to Step 5 of **Basic Flow** in this use case and be presented with the custom report layout that was defined/modified.

1.4.3.9 Select Download Report

At Step 6 of the **Basic Flow**, the USER will have the ability to download the current report view to a comma-delimited file. If the USER selects to download a comma-delimited version of the report, the system must publish a comma-delimited file that includes all of the data within the columns of the current report view. The comma-delimited file should include column headings for each of the columns of data provided to the USER. The comma-delimited file must also include report header information that includes:

- Report View (open ticket detail/closed ticket detail)
- Name of the Adjuster
- Date and time the report was generated

The system should return the USER to the report view (Step 6 of the **Basic Flow**) once a report has been successfully downloaded.

1.5   Post-Conditions

- If successful, a standard report is created for the USER.
- If unsuccessful, the system state remains unchanged.

1.6   Special Requirements

The special requirements for this use case define all of the management report 'views' that are available to the USER. Management reports will be provided two USERs in two ways:

- 'Standard' reporting views that have been defined by Enterprise at the request of customers
- 'Custom' reporting detail views that allow the USER to define the columns of data that they would like to be present in a report

1.6.1   Standard Management Reporting Views

Standard management reporting views are views that have been defined by Enterprise based on the requests of customers. These views will be carried forward in to ARMS Web and are defined in this section. *(see Figure E.58)*

The table below includes the detailed data fields that are available on each of the 'standard' management reports. The columns available in each report have been expanded somewhat over the current state, as the web environment offers more flexibility to provide additional information than the current state green screen application. The sequence of columns that must be presented in each report are indicated using the number 1-10, with fields that are on the screen but not in the primary data table indicated with an 'X'. For example, the first column in the 'Adjuster -- Open Detail' report is the renter name, the second column is the claim number, etc.

	Adjuster				Repair Facility				Office			
	Open Summary	Open Detail	Closed Detail	Closed Summary	Open Summary	Open Detail	Closed Detail	Closed Summary	Open Summary	Open Detail	Closed Detail	Closed Summary
Adjuster Name	1		1	1								
Renter Name		1				1				2	2	
Claim Number												
Claim Type												2
Authorized Days*	5		9	9	9		9	9	9		3	5
Authorized Rate*	9		9	9	9		9	9	3			3
Rental Days*	1				1				4			
Billed Days*+		5	4			5	4			5	4	
Days Behind*	6				6				6			
Number of Extensions*	7		6		7		6		7		6	
Surcharges												
Authorized Amount*	9				6				5			
Amount Received*			6				6				6	
Total Charges*			7				7				7	
Billed Amount*			9				9				9	
Total Contracts	2		2		2		1		2		X	
Repair Facility Name												
Repair Facility Telephone												
Office Name											1	X
Month/Year												1

+ Not available in current state system. Being implemented by the ARMS Maintenance team.

Figure E.58

[handwritten margin note: More to exp. figure]

1.6.1.1   All numeric fields should have averages provided at the foot of each corresponding column. Numeric fields are indicated with an asterisk (*) in the list above.

1.6.1.2   The default sort for the Open Ticket Detail views must be by the Number of Days Behind field, with open tickets that are the farthest behind presented at the top of the list.

1.6.1.3   The default sort for the Closed Ticket Detail views must be by Claim Number.

1.6.1.4   The default sort for the Open Ticket Summary views must be by Adjuster Name (if by Adjuster), Repair Facility Name (if by Repair Facility), or Office Name (if by Office)

1.6.1.5 The default sort for the *Closed Ticket Summary* views must be by Adjuster Name *(if by Adjuster)*, Repair Facility Name *(if by Repair Facility)*, or Month/Year *(if by Office)*

1.6.1.6 Any items in an *Open Ticket Detail* view that have a value greater than zero (0) in the Number of Days Behind *field should be highlighted to the USER.*

1.6.1.7 All report views must include a count of the total number of contracts listed.

1.6.1.8 The report view must include report header information *(in both screen and downloaded versions) that includes:*

- the type/name of the report view (e.g., open ticket detail, open ticket summary)
- the name of the entity that is being reported on. For summary views, this should always be the office name. For detail views, the entity name must be:
  - the adjuster name (for reports by Adjuster)
  - the office name (for reports by Office)
  - the repair facility name (for reports by Repair Facility)
- the date/time the report was generated

1.6.2 Custom Management Reporting Views

Custom management reporting views allow the USER to define the fields that they would like to use to build their own report. The fields selected by the USER become the columns of the report, and the system will not limit the number of columns that a USER can request as part of the report. Custom reporting views are discussed at length in use case RP-03 Add/Edit Custom View.

1.6.3 Report View Management

The system will present all of the records in a report result set on a single page, and the USER will scroll through the results to find specific records. Report views will <u>not</u> be presented in paging format (e.g., forcing the USER to review the Next 25 of 427 records).

1.7 Extension Points

This section describes the extension points of this use case.

1.7.1 MA-13 Change Authorization

If the USER selects a line item from the Open Ticket Detail report view, the USER will extend into the MA-13 Change Authorization use case (see the Select Open Ticket from Open Ticket Detail Report **Alternative Flow** on page 4 for additional detail). The USER will have the ability to make any changes or updates that their security level allows, and have the opportunity to return to this use case without making any changes to the open ticket. On completion of activity in the MA-13 Change Authorization use case, the USER will be returned to Step 6 of the **Basic Flow** within this use case.

1.7.2 RP-03 Add/Edit Custom View

If the USER selects to add or edit a custom view, the USER will extend into the RP-03 Add/Edit Custom View use case (see the Add/Edit Custom View Alternative Flow on page 5 for additional detail). The USER will define or modify their custom report layout and be returned to Step 6 of the **Basic Flow** within this use case.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Management Report View Template

This screen provides the USER with a management report view template, and supports Step 6 of the **Basic Flow**.

2.1.1 Screen Layout — see figure E.59

Figure E.59

2.1.2 Screen Field Definition

Screen Label	Type	Length	Data Field	Screen Specific Rule
Office	Combo Box		Branch claims office	This combo list should include all of the offices for the currently active company that the USER is assigned to.

If the value of this field is changed, the system should automatically refresh the screen with the current report view for the newly selected office. |
| Handling for | Output Text | | Handling for | For management reports, this value should always be 'Yourself'. |

Screen Label	Type	Length	Data Field	Screen Specific Rule
	Output Text		<Report By>	The <report by> field is a placeholder in the header of the report view. For management reports, this placeholder should be populated with the name of the entity that is being reported on (i.e., Adjuster Name, Office Name, or Repair Facility Name).
	Output Text		<Time/Date Stamp>	The <time/date stamp> field is a placeholder in the header of the report view. For management reports, this placeholder should be populated with the date and time that the report was generated.
	Output Text		<Report Type>	The <report type> field is a placeholder in the header of the report view. For management reports, this placeholder should be populated with the name of the current report view (e.g., Open Ticket Detail, Custom View 1)
<Column Heading 1 through X>	Output Text		<Data Columns 1 through X>	The data columns of the report should correspond to the data columns defined for the selected report view (either static or custom report view). The data columns should be presented in the sequence that they are defined.
Total	Output Text		Number of Customer Files	The total field should include the total number of contracts/customer files that are represented in the report.
Go to	Combo Box		Report sorted by navigation	The 'Go to' combo box should include all of the entities available in the current report. For example, if the report were an Open Ticket Detail view Reported By Adjuster, this list would include all of the Adjusters that would PAGE in the list.

The 'Go to' combo box should only be available in detail views. |
| Report by | Combo box | | Report sorted by | The 'Report by' combo box should include all of the currently available report by options in the ARMS Web system. The report by options for the initial release of ARMS Web 2.0 should be: 'Office', 'Adjuster', and 'Repair Facility' |
| Select a view | Combo Box | | Report view selection | The 'select a view' combo box should include the names of all report views that are available to the user. This includes all pre-defined (e.g., Open Ticket Detail) and user-defined custom views.

There should be an additional option to 'Add a custom view…'. If selected, the system should redirect the user to the Add/Edit Custom View screen in the RP-03 Add/Edit Custom View specification. |

Screen Label	Type	Length	Data Field	Screen Specific Rule
Show Only	Combo Box		Claim Type Filter	The 'show only' combo box should include the following values: • All Claim Types (default) • Insured Claim Types • Claimant Claim Types • Uninsured Claim Types • Theft Claim Types When selected, the report should filter the records to display in the requested report view according to the selection in this combo box. For example, if the selection in the 'show only' field were 'Insured Claim Types', the report view would only include records that have a Claim Type of 'Insured.
From	Combo box		Closed ticket report from date	The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'January 2000'. The default value should be 2 months prior to the current month.
To	Combo box		Closed ticket report to date	The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'July 2000'. The default value should be the current month.

2.1.3   Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Choose a different report

The 'Choose a different report' screen function provides the USER with a hyperlink to the View a Different Report section of the Personal Report Template screen. The 'Choose a different report' screen function must be at or near the header of the report.

2.1.3.2 Go to Report Averages

The 'Go to Report Averages' screen function provides the USER with a hyperlink to the bottom of the report to review the averages for each of the numeric columns in the report view. The 'Go to Report Averages' hyperlink must be at or near the header of the report.

2.1.3.3 Column Heading Sort

The 'Column Heading Sort' screen function allows the USER to click on any column heading and have the current report view sorted by the selected column. On initial selection of a column

heading, the system will resort the report view by the column selected in ascending order. If the sorted column is selected by the USER, the system will resort the report in descending order.

2.1.3.4 Previous <Report By>

The 'Previous <Report By>' screen function allows the USER to navigate to the previous detail record in a particular detail report. For example, if the report view were an Open Ticket Detail report by Repair Facility, the 'Previous <Report By> screen function would allow the USER to move to the previous Repair Facility detail record in a report. This screen function should only be available on open or closed ticket <u>detail</u> views (including custom views), and should only be available if a previous report by item exists (i.e., we wouldn't have a previous item if we were on the first item in the list).

2.1.3.5 Next <Report By>

The 'Next <Report By>' screen function allows the USER to navigate to the next detail record in a particular detail report. For example, if the report view were an Open Ticket Detail report by Adjuster, the 'Next <Report By> screen function would allow the USER to move forward to the next Adjuster's detail report view within the office. This screen function should only be available on open or closed ticket <u>detail</u> views (including custom views), and should only be available if a next report by item exists (i.e., we wouldn't have a next item if we were on the last item in the list).

2.1.3.6 Download this report

The 'Download this Report' screen function allows the USER to click on a hyperlink and download a comma-delimited copy of the current report view. The downloaded copy must include:

- ❖ Report Header Information
  - ➢ Name of the Report View
  - ➢ Name of the Person
  - ➢ Date and Time that the Report Was generated
- ❖ Report View Column Headings
- ❖ Report View Records

2.1.3.7 View Report

The 'View Report' screen function allows the USER to submit a request for a different type and/or date range of the report view. The system will refresh the screen with updated report view information when this screen function is invoked.

2.1.3.8 Edit Custom View

The Edit Custom View screen function is available only in cases that the USER has a custom defined view active. If the USER selects the Edit Custom View hyperlink, the system will present the USER with the Add/Edit Custom View screen and pre-populate the screen with the custom view definition. This will allow the USER to edit the custom views that they have previously defined.

Enterprise Rent-A-Car

Functional Design Specification
Add/Edit Custom View

Version 1.1

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Revision History

Date	Issue	Description	Author
2000-07-06	0.1	Initial draft published to design team for review and comment.	Sean O'Donnell
2000-07-23	0.2	Added the screen design section to the document with designs received from Marketing	Sean O'Donnell
2000-07-24	1.0	Version published to application build team for construction.	Sean O'Donnell
2000-08-09	1.1	Updated the specification with changes recommended by the business and build teams.	Sean O'Donnell

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Add/Edit Custom View

1. Generate Management Report

1.1 Brief Description

The Add/Edit Custom View use case describes the process to add or edit a custom report view in the ARMS Web system. Custom views allow the USER to select the data columns that they would like to view in a report (from a pre-defined list of available fields). USERs will have the ability to access their custom views just as they would any other 'standard' report view.

1.2 Use Case Actors

All actors will use the use case to add or edit a custom report view(s) in the ARMS Web system. All of the following actors can be defined generically as a USER:

- **ADJUSTER**
- **COMPANY MANAGER**

For the balance of this use case, all of the above actors will be referred to as USER.

1.3 Pre-Conditions

- The USER must be signed-on to the system.
- The USER must have the on-line reporting functionality active (i.e., must be on an on-line reporting screen).

1.4 Flow of Events

The Flow of Events includes all the steps necessary to add or edit a custom report view in the ARMS Web system.

1.4.1 Activity Diagram — see Figure E.60

Add/Edit Custom View Activity Diagram
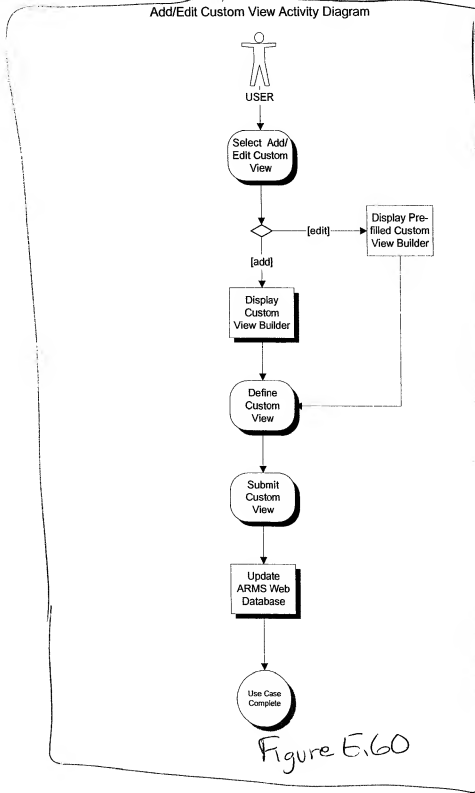
Move to sep. figure

Figure E.60

1.4.2   Basic Flow

The **Basic Flow** of the Add/Edit Custom View use case includes all of the required activities for the USER to successfully add or edit a custom report view for use in the on-line reporting functionality of ARMS Web.

1. The USER selects to add or edit a custom report view from the on-line reporting screen(s).

2. The system displays a screen that allows the USER to define or build a custom report view.

3. The USER defines the custom report view. The USER will have the ability to indicate a Name for the view, and define the data columns that they would like to have reported. The comprehensive list of data columns that will be available to the USER can be found in Section 1.6 Special Requirements (on page 4).

4. The USER will submit the custom view to the system.

5. The system will update the ARMS Web database.

6. This ends this use case.

1.4.3   Alternative Flows

The **Alternative Flows** of this use case can occur when certain conditions exist or when specific USER feedback is provided.

1.4.3.1 Edit Custom Report View

At Step 1 of the **Basic Flow**, if the USER selected to edit a current custom report view, the system will present the screen to define/build a custom report and pre-fill all fields with the current report definition. For example, if the USER were editing their 'Massive' custom report view, 'Massive' would appear in the report name field and all of the data columns that were previously defined as the massive report would appear in the 'selected columns' portion of the screen.

1.5   Post-Conditions

- If successful, a custom report view is created for the USER.
- If unsuccessful, the system state remains unchanged.

1.6 Special Requirements

The special requirements for this use case define all of the management report 'views' that are available to the USER. Management reports will be provided two USERs in two ways:

1.6.1 Custom Report Definition

This section provides the system framework for custom report view definition in the ARMS Web system. These are additional requirements around functionality to allow USERs to define/build custom report views, and apply to the use case as a whole.

1.6.1.1 USERs will have the ability to create one or more custom views.

1.6.1.2 USERs will be able to define custom report views for DETAIL views only (USERs will not have the ability to define custom summary views[1]).

1.6.1.3 USERs will have the ability to select custom report views by Office, by Adjuster, or by Repair Facility (similar to the standard management reports).

1.6.1.4 Custom report views will be limited to the data columns in the Custom Report View Data Domain (see 1.6.2 Custom Report View Data Domain)

1.6.1.5 Custom report views must define if the report view retrieves Open, Closed, or All Ticket statuses.

1.6.1.6 All custom report views defined as 'closed ticket only' must allow the user to indicate a date range. The default date range for custom views will be the same as the default range for standard closed ticket reports (the current month plus two (2) prior months).

1.6.1.7 When a custom report view has been defined, the name of the custom report view will become a selection from the USERs view list. For example, 'MyCustomView' would be seen in the list with 'Open Ticket Detail', 'Closed Ticket Detail', etc..

---

[1] Most of the numeric fields that can be summarized for USERs are already provided in the standard management report views.

1.6.2 Custom Report View Data Domain

The following is a list of all available data columns that a USER may select as part of a custom report view. The number of columns that a USER selects to make part of the custom report view is not limited, which allows the USER to select a subset or all of these data fields to be published in their report.

Adjuster	Claim Number	Claim Type
Office Name	Renter Name	State of Rental Location
Authorized Days	Authorized Rate	Policy Daily Rate
Days Behind	Number of Extensions	Policy Maximum Rate
Rental Days	Billed Days	Billed to %
Repair Facility Name	Insured Name	Rental Status
Total Charges	Billed Amount	Amount Received
Other Charges	Vehicle Condition (Driveable Flag/Repairable Flag)	Authorized Total Amount
Surcharges Flag	Rental Start Date	Rental Close Date
Termination Date	Invoice Date	Invoice Approved Date
Remittance Date	Repair Facility Phone Number	

1.7 Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Add/Edit Custom View

This screen provides the USER with the ability to add or edit a custom view, and supports Step 2 of the **Basic Flow**.

2.1.1 Screen Layout — *see figure E.61*

Figure E.61

→ Move to sep. figure

2.1.2 Screen Field Definition

Screen Label	Type	Length	Data Field	Screen Specific Rule
Name this report	Text		Custom Report Name	The name a USER provides to refer to the custom report view definition. The name of the report must be unique to other custom reports defined by the user (e.g., a single user can not have two reports with the same name). This uniqueness must only be enforced at the user level (e.g., two different users CAN use the same name for a report). The name of the report will appear in the USERs 'Select a view' combo box when the report view is saved.
Start from a View	Combo box		Custom view start point	The 'Start from a View' combo list allows a USER to select a default or 'standard' view as a starting point in report view definition. The values within the combo box should be 'Open Ticket Detail' and 'Closed Ticket Detail'. If selected, the system should use the values of the Report by 'Adjuster' standard report to pre-populate the 'New Report Fields' list box.. The default value of this field should be '-Select a Starting View-'
Ticket Status	Combo box		Custom view ticket status	The 'Ticket Status' combo box indicates the scope of the report in terms of ticket status. The list should include 'Open Tickets', 'Closed Tickets', and 'All Tickets'. The system will use this as part of the overall custom report definition.
Available Fields	List Box		Custom view available fields	The 'Available Fields' list box includes all of the fields that are available to be included in a custom view, but have not yet been selected to be included in the report. When an available field is selected from the list to be included in the report, the field should be removed from this list box (and populate the 'New Report Fields' list box). For a list of all available fields see Section 1.6.2 Custom Report View Data Domain above.

Screen Label	Type	Length	Data Field	Screen Specific Rule
New Report Fields	List Box		Custom view selected fields	The 'New Report Fields' list box includes all of the fields that have been selected by the USER. These fields define the columns of the report. The sequence that the fields appear in the report is defined from top to bottom of this list box (e.g., the first field in the list = the first column in the report). This sequence can be modified using the Sequence Up and Sequence Down screen functions (see 0 Screen Function Definition below). If the USER selects a starting view (from the Start from a View field), the list box will populate with all of the fields that make up the standard view selected (e.g., if the USER selects 'Closed Ticket Detail' from the Start from a View field, all of the fields that make up a Closed Ticket Detail report would populate in this field.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Remove

The 'Remove' screen function allows a USER to remove selected fields from the 'New Report Fields' list box (and re-add them to the 'Available Fields' list box).

2.1.3.2 Insert

The 'Insert' screen function allows a USER to add selected fields to the 'New Report Fields' list box (and remove them from the 'Available Fields' list box).

2.1.3.3 Dictionary

The 'Dictionary' screen function allows a USER to open a dictionary that defines all of the fields that can be added to a report view. The dictionary will be included as part of the help functionality of the system.

2.1.3.4 Sequence Up

The 'Sequence Up' screen function (presented with an 'up' arrow in the screen shot) allows a USER to move a **selected** field in the 'New Report Fields' list box up in the sequence of the report.

2.1.3.5 Sequence Down

The 'Sequence Down' screen function (presented with a 'down' arrow in the screen shot) allows a USER to move a **selected** field in the 'New Report Fields' list box down in the sequence of the report.

2.1.3.6 Save Report View

The 'Save Report View' screen function allows the USER to save the custom report definition and return to the reporting use case(s). The system will return the USER to the report use case from which they entered this use case (either RP-01 or RP-02) and be presented with the newly defined report view.

2.1.3.7 Close without Saving

The 'Close without Saving' screen function allows the USER to exist the screen with saving any changes made. The system will return the USER to the report use case from which they entered this use case (either RP-01 or RP-02).

2.1.3.8 Delete

The 'Delete' screen function allows the USER to delete a custom report view from their profile. When a custom report view is deleted it should no linger be available in the USERs view selection combo box. The system will return the USER to the report use case from which they entered this use case (either RP-01 or RP-02).

Enterprise Rent-A-Car

**Functional Design Specification
Maintain User**

Version 1.3

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Revision History

Date	Issue	Description	Author
3/29/00	1.0	Subdocuments merged into master document	Brad Reel, Anil Kabra, Russ Dittmar, Deborah Ealick, Johnny Sands, Gary Thomae, Cindy Bastean
4/4/00	0.2	Revisions after cross team review and inter-team final review	Brad Reel, Deborah Ealick, Cindy Bastean
July 5, 2000	1.0	Re-write to update based on iteration one feedback	Brad Reel
September 15, 2000	1.2	Modified to reflect resolved issues	Brian Weingart
September 25, 2000	1.3	Updated screens and specs	Brian Weingart

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Maintain User

1. Maintain User Use Case

1.1 Brief Description

The Maintain User use case describes how a USER would set up or maintain a user in the ARMS Web system.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ENTERPRISE ADMINISTRATOR** – The ENTERPRISE ADMINISTRATOR is a person who can perform this use case to set up any user in a company.

- *COMPANY ADMINISTRATOR – The COMPANY ADMINISTRATOR is a person who can perform this use case for the company. They may add users and assign them to office(s) that they are the administrator of within the company.*

- **OFFICE ADMINISTRATOR** – The OFFICE ADMINISTRATOR is a person who can perform this use case for the company. The OFFICE ADMINISTRATOR may maintain any user in their company structure to which they have been assigned ownership.

1.3 Pre-Conditions

- The USER must be logged into the system.
- If maintaining a user, the USER should have the ability to maintain that user. In order to maintain a user at a specific office, the ADMINISTRATOR must have access to that specific office.
- If adding a user, the USER should have the ability to add a user.

1.4 Flow of Events

The Flow of Events will include all the steps necessary to add or maintain a company user in the ARMS Web system.

1.4.1 Activity Diagram — see Figure E.62

Maintain User Activity Diagram

Figure E.62

More to sep. figure

9/14/00   Y:\APPS\#ARMS\web\application\@dkb\ARMS Web\Release One\PR-Profiling\PR-05 Maintain
User\ACTIVITY DIAGRAMS\PR-05 MAINTAIN USER.VSD

Confidential   Enterprise Rent-A-Car © 2000   5
http://intranet/dm2/ReadDocOrLink.ASP?FolderID=2706&DocID=10694

1.4.2 Basic Flow

The Basic Flow will describe how a USER will maintain a user in the ARMS Web system.

1. The USER will choose to maintain user(s).
2. The system will present a list of all users that are in all the offices the USER has access to maintain.
3. The USER will choose a user to maintain.
4. The system will display the user's information for the USER to edit.
5. The USER will update the user's information and submit the information to the system.
6. The system will validate the information entered.
7. The system will update the ARMS Web database.
8. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Add User

At step three in the Basic Flow, the USER may choose to add a user, if they have the authority level to do so. The USER will enter a primary office, UserID, First Name and Last Name for the new user. The system will then validate that the office was entered and the UserID does not exist. If a UserID match is found, or the office was not entered, the system will display an error and request the USER enter a new UserID. Otherwise, the system will display the default settings for a new user; the USER will update the default settings and submit the information to the system. The system will validate the information entered, and update the ARMS Web database. The use case is then complete.

1.4.3.2 Show All Users for the Company

At step three in the Basic Flow, the USER may choose to display all users within the company. This would allow for adding users to offices the USER controls. The USER will choose the user they wish to work with and the system will then display the user's information; the USER will add the user to any offices the USER controls and submit the information to the system. The system will validate the information entered, and update the ARMS Web database. The use case is then complete.

1.4.3.2.1 If a user's primary office is not an office controlled by the USER, the USER may only add the user to offices the USER controls. The USER should not be able to change any of the user's settings. A USER that has control of a user's primary office can only change user settings.

1.4.3.3 User Information Validation Fails

In step six of the Basic Flow, the system may find that user information entered by the USER does not meet the validation criteria. The system should return the USER to step four of the Basic Flow, show the USER the invalid data, and prompt the USER to reenter the data.

This rule also applies for new user creation. Whenever a new user is submitted to the system for creation, the system must validate that the criteria entered is valid. If any information is invalid, the system should present the invalid date to the USER, and prompt the user to correct it.

1.4.3.3.1 The following fields must be populated to complete a user update or new user creation.
- Last Name
- First Name
- UserID (Must be validated to ensure it is not a duplicate ID)
- Home Office (Must be a valid office and not null)

1.4.3.4 Cancel Add / Maintain User

Until step five in the Basic Flow, the USER may choose to cancel the use case. The system

should not store any changes made by the USER within the use case.

1.5 Post-Conditions

- If the use case was successful and the USER was maintaining a user, the user criteria being changed will have been changed and updated in the ARMS Web system.
- If the use case was successful and the USER was adding a user, the user will have been added in the ARMS Web system.
- If the use case was unsuccessful, the system state will be unchanged.

1.6 Special Requirements

1.6.1 User Inactivation

In order to inactivate a user, the following set of criteria must be validated. If any of the criteria are found to be true, then the system will not allow the USER to inactivate the user.

- If A4XREFL1/X4STCD is equal to 'C' (closed rental) and any tickets were closed in the past seven days

- If A4XREFL1/X4STCD is equal to 'A' (audited invoice)

- If A4XREFL1/X4STCD is equal to 'R' (reservation)

- If A4XREFL1/X4STCD is equal to 'O' (open contract)

- If A4XREFL1/X4STCD is equal to 'U' (unconfirmed) and A4XREFL1/X4RSFG is equal to 'D' (Direct Bill request)

- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'C' (extension request & message sent)

- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'M' (authorization message sent)

- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'X' (extension request sent)

- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'B' (invoice sent from ARMS)

- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'R' (invoice returned to adjuster)

- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'E' (rejected system error)

- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'Q' (rejected invoice ARMS researching)

1.6.2 User Default Settings

Whenever a new user is created, the settings for that user should be defaulted based on the user's primary office profile settings. For example, if the office is a reservation only office, the user should default to reservation only. This does not imply that the administrator cannot change the settings. This should also apply to whether can receive work setting should be on or off for the user/team. If all other users/teams in the office have the setting either on or off, then the new user should mimic this setting. Once again, this does not imply that the administrator cannot change this setting.

1.7 Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Create or Modify User

This screen will allow the USER to search for and select a user to modify or select to add a new user.

2.1.1 Screen Layout + see figure E.63

Move to sep. figure

Figure E.63

2.1.2 Create or Modify User

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
New Team	Radio Button	1	Create a New Team		
New User	Radio Button	1	Create a New User Indicator		
User ID:	Input	10	User Id	ARMS Profile ID	
First Name:	Input	15	First Name of New User	First Name	
Handling For	Output	30	Handling For	First Name + Last Name	
Last Name:	Text Box	20	Last Name of New User	Last Name	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
User ID	Output	10	List of User Ids within the company	Adjustor Code	
Name	Output	30	List of Users within a Company	First Name + Last Name	
User ID:	Input	10	User Id	Adjustor Code	
Primary office	List Box	25	Primary office	external organization name	
Primary office	Output	10	List of Primary offices	external organization abbreviated name	
Office Description	Output	20	List of Office Descriptions within Company	external organization name	
Office:	Output	4	Office Id	external organization abbreviated name	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 A – Z Anchor Links

When any of the letters are clicked, the list of users should position itself with that letter presented at the top of the user view area on the page.

2.1.3.2 Teams Link

When the team link is clicked, the list of teams should position itself at the top of the view area on the page. The list of teams should be placed last in the list of all users/teams.

2.1.3.3 Process

When the Process button is clicked, the system should check to see that the appropriate information was entered in order to create a new user (Office, Last Name, First Name UserID). If the information is entered, the system will create a new user with those attributes and the other user attributes defaulted. The system should then display the new user's profile.

2.2 Create or Modify Team

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.2.1 Screen Layout — *see Figure E.64*

More to sep. figure

Figure E.64

2.2.2 Create or Modify Team

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
New Team	Radio Button	1	Create a New Team		
New User	Radio Button	1	Create a New User		
Name	Output	20	Adjusters Associated with the Company	First Name + Last Name	
Handling For	Output	20	Handling For	First Name + Last Name	
User ID	Output	7	List of User Ids Associated with a Company	Adjustor Code	
Primary office	List Box	20	Primary office associated with Team	external organization abbreviated name	
Primary office	Output	10	List of Primary offices Associated with a Company	external organization abbreviated name	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Office Description	Output	20	List of Office Descriptions associated with a comp	external organization name	
Office	Output	10	Office	external organization abbreviated name	
Team Name	Input	15	Team Name	external organization name	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 A – Z Anchor Links

When any of the letters are clicked, the list of users should position itself with that letter presented at the top of the user view area on the page.

2.2.3.2 Teams Link

When the team link is clicked, the list of teams should position itself at the top of the view area on the page. The list of teams should be placed last in the list of all users/teams.

2.2.3.3 Process

When the Process button is clicked, the system should check to see that the appropriate information was entered in order to create a new team (Office, Team Name). If the information is entered, the system will create a new team with those attributes and the other user attributes defaulted. The system should then display the new team's profile.

2.3   User Profile

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.3.1   Screen Layout   — see Figure E. 65

Welcome to the
Automated Rental Management System

CREATE A RESERVATION   FIND A CUSTOMER

Claims Office: 001   Handling for: Yourself

Administration:
MODIFY USER

User Information:

Office:

| 001 |
| 002 |
| 003 |
| 004 |
| 005 |

*Selected Office

Move to sep. figure

Authorizations:

Work Authority:

top of page

Contact Us | Terms & Conditions | Log Off

Figure E.65

2.3.2   User Profile

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Reset Password	Check Box	1	Reset Password Indicator		

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Email Address:	Text Box	15	Adjuster's Email Address	e-Mail address	
First Name	Text Box	15	First Name	First Name	
Handling For	Output	10	Handling For	First Name + Last Name	
Last Name	Text Box	10	Last Name	Last Name	
User ID:	Output	0	User Id	Adjustor Code	
Active	Check Box	1	User is Active	Status:Active/Inactive	
Address	Output	25	Home Office Address	Customer Address Line 1+ Customer Address Line 2	
Phone:	Output	10	Home Office Phone Number	Customer Phone Number + Customer Phone Extension	
Postal	Output	10	Home Office Postal Code	Zip Code	
City	Output	15	Home Office City	customer city text	
ST/PROV	Output	5	Home Office State	customer state code	
Office	Output	10	Office	external organization abbreviated name	
Home Office	List Box	20	Office Name	external organization name	
Other authorized Offices	List Box	20	Other authorized Offices for The User	external organization name	
Allow files and action items to be assigned to this user	Check Box	1	Allow files & action items to be assigned to user	profile type value code	If Allow Files and Action Items have been selected, this user or team will appear in the Handle For list.
Authorize/Extend Rental	Check Box	1	Allow user to Authorize/Extend Rental	profile type value code	
User Maintence	Check Box	1	Allow user to conduct user maintenance	profile type value code	
Create Reservation	Check Box	1	Allow user to create reservation	profile type value code	
Reporting (Management)	Check Box	1	Allow user to do reporting	profile type value code	
Pay Invoice	Check Box	1	Allow user to Pay Invoices	profile type value code	
Days/Rental	Text Box	10	Authorization Limit on Days per Rental	profile type value quantity	
$ ___ max/rental	Text Box	10	Authorization Limit on Maxmimum Dollars per Rental	profile type value amount	

2.3.3   *Screen Function Definition*

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 Process

When clicked, the system will ensure that all rules on the page are enforced. Upon completion, the system will return the USER to the Create a New User / Team page.

2.3.3.1.1 The user must have a First Name, Last Name and Home Office entered. The Home Office must be a valid office for that company.

2.3.3.1.2 Work Authority for each user will default to all enabled.

2.3.3.1.3 If the Active switch has been set to inactive, the system will check to see if the user owns any open work. If the user owns work, the system will not allow the user to be set to inactive. The system will notify the USER that the user has open work assigned to them and request that they transfer the work before attempting to inactivate the user.

2.3.3.1.4 If the reset password option is set, the system will reset the user's password. This will reset the user's password to the password used for new users. **Need to verify what that password is.**

2.3.3.1.5 If the File Ownership flag is turned off, the system will check to see if the user owns any open work. If the user owns work, the system will not allow the file ownership flag to be turned off. The system will notify the USER that the user has open work assigned to them and request that they transfer the work before attempting to turn off file ownership.

2.4 Team Profile

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.4.1 Screen Layout — See Figure E.166

Figure E.166

Move to szi. figure

2.4.2 Create or Modify Team

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Allow files and ction items to be assigned to this team	Check Box	1	Allow action items to be assigned to team		
Available	List Box	30	Available Members for Team	First Name + Last Name	
E-mail Address	Text Box	20	Email Address	e-Mail address	
Handling For:	Output	20	Handling For:	First Name + Last Name	
Active	Check Box	1	Team Active Indicator	Status:Active/Inactive	
Team Members	List Box	30	Team Members	First Name + Last Name	
Phone Number	Output	10	Branch Office Phone Number	Customer Phone Number + Customer Phone Extension	
Postal	Output	10	Branch Office Postal Code	Zip Code	
Address	Output	25	Home Office Address	Customer Address Line 1 + Customer Address Line 2	
ST/PROV	Output	3	Branch Office State or Province	customer state code	
City	Output	15	Home Office City	customer city text	
Home Office	Output	20	Home Office Name	external organization name	
Office	Output	5	Office	external organization abbreviated name	
Team Name	Text Box	20	Team Name	external organization name	

2.4.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.4.3.1 Process

When clicked, the system will ensure that all rules on the page are enforced. Upon completion, the system will return the USER to the Create a New User / Team page.

2.4.3.1.1 The team must have a Team Name and Home Office entered. The Home Office must be a valid office for that company.

2.4.3.1.2 If the Active switch has been set to inactive, the system will check to see if the team owns any open work. If the team owns work, the system will not allow the team to be set to inactive. The system will notify the USER that the team has open work assigned to them and request that they transfer the work before attempting to inactivate the team.

2.4.3.1.3 If the File Ownership flag is turned off, the system will check to see if the team

owns any open work. If the team owns work, the system will not allow the file ownership flag to be turned off. The system will notify the USER that the team has open work assigned to them and request that they transfer the work before attempting to turn off file ownership. If the user or team does not receive File Ownership, that user or team will not display in the Handle For list.

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Build list of Users

(Office Id, First Name, Last Name, User ID)
Build a list of User first and last names NOT limited to a given office in order to search for a user. Limited by the first or last name passed.

3.2 Find User Information

(User Id)
Retrieve the current values for a user's profile.

3.3 Update User Information

(User Id, Name, e-mail Address, Out of Office, Handler for out of office user, Initial Page, Is user Multi-company, Is User Active, Current Password, New Password, Receive Authorization Assignment)
Update the given data values for the user profile.

3.4 Build list of User offices

(User Id)
Build a list of office names for the offices the user is assigned to.

3.5 Find User Office Information

(User Id, Office Id)
Retrieve the current values assigned for the user at a given office.

3.6 Update User Office Information

(User Id, Office Id, and data values)
Update the given data values for the user profile.

3.7 Add User Office Information

(User Id, Office Id)
Assign user access to another office. Default values are set for the users access.

3.8 Remove User Office Information

(User Id, Office Id)
Revoke assignment of the user to an office. The user cannot be revoked from their primary office

3.9 Build a list of users to which the administrator has access

(Company ID, Administrator ID, User ID)
Build a list of User first and last names limited to a given office in order to maintain a user. Limited by the first or last name passed.

3.10 Validate that User ID does not exist

(User ID)
Verify that the administartor must add a new user.

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

4.1.1 User Language Preference

This is the user's language preference while working with the ARMS Web System.

Data Field Type: Alpha-Numeric
Data Field Length: 10
Data Source: <Data Source>

4.1.2 Phone Number

This is the user's phone number.

Data Field Type: Alpha-Numeric
Data Field Length: 10
Data Source: <Data Source>

4.1.3 Profile Attribute Id

I.S. assigned identifier for a profile attribute. Must be unique and non-blank. Each profilable item will have a profile attribute.

Data Field Type: Alpha-Numeric
Data Field Length: 20
Data Source: <Data Source>

4.1.4 Last Name

This is the last name of the user.

Data Field Type: Alpha-Numeric
Data Field Length: 20
Data Source: <Data Source>

4.1.5 Handler for out of office user

This is the user who will handle work for the user who is out of office.

Data Field Type: Alpha-Numeric
Data Field Length: 0
Data Source: <Data Source>

4.1.6 Start Page

This is the initial page that the user will see when he logs on to the system.

Data Field Type: URL
Data Field Length: 256
Data Source: <Data Source>

4.1.7 Is user out of office ?

This flag indicates that the user is out of office and no work should be assigned to them. Instead another user can be set up to handle for the user who is out of office.

Data Field Type:	Boolean
Data Field Length:	1
Data Source:	<Data Source>

4.1.8 Is the user multicompany ?

This flag indicates that this user can do work for multiple insurance companies. These are typically Enterprise Rent-A-Car employees working on site at an insurance company office or Rental Management Services employees who are also Enterprise employees who manage rentals for the insurance company but are not on site.

Data Field Type:	Boolean
Data Field Length:	1
Data Source:	<Data Source>

4.1.9 Can user receive work ?

This flag indicates that user can receive work (e.g. requests for authorization, requests for extension etc.). Typically, a manager would set this flag to "No" so that work would not be assigned to him or her although he or she could be notified in certain situations like authority limit exceeded etc..

Data Field Type:	Boolean
Data Field Length:	1
Data Source:	<Data Source>

4.1.10 Is User Active ?

This flag indicates the user is currently active and may log on to the system to do work.

Data Field Type:	Boolean
Data Field Length:	1
Data Source:	<Data Source>

4.1.11 Email Address

This is the email address of the user.

Data Field Type:	Alpha-Numeric
Data Field Length:	30
Data Source:	<Data Source>

4.1.12 First Name

This is the first name of the user.

Data Field Type:	Alpha-Numeric
Data Field Length:	15
Data Source:	<Data Source>

4.1.13 Password

This is the user specified password that the user will use along with the user id to log on to the ARMS Web System.

Data Field Type: Password
Data Field Length: 10
Data Source: <Data Source>

4.1.14 User Id

This is the user id that the user will use to sign on to the ARMS Web System. This id must be unique across the whole system.

Data Field Type: Alpha-Numeric
Data Field Length: 10
Data Source: <Data Source>

5. **Questions and Answers**

Issue Number: 321

Question: When do we "Kill" profiles that have been created but not used?
Question 2 - Do we allow for deleting users, and if so, who would handle this
function? Question 3 - Do we allow for deleting inactive user, and if so, who
would handle this function?

Status: Closed - Resolved

Resolution: 3-21-00, Dave Smith - The other questions would seem to have
procedures in place today. Unless there is a compelling reason, I don't think we
should reinvent the wheel. Could you check with the ARMS team to find out?
08-07-00 - Brad Reel: UserIDs that were created, but never accessed will be
made inactive after six months. UserIDs that have not been accessed for two
years will also be made inactive. After being made inactive, they will be purged
after three additional months.

Issue Number: 322

Question: Do we allow for deleting users, and if so who would it be that does
so?

Status: Closed - Merged

Resolution: 3-21-00, Dave Smith - The other questions would seem to have
procedures in place today. Unless there is a compelling reason, I don't think we
should reinvent the wheel. Could you check with the ARMS team to find out? 3-
27-00, merged with Issue 321

Issue Number: 323

Question: When do we delete an inactive user? And who would handle?

Status: Closed - Merged

Resolution: 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out?3-27-00, merged with issue 321

Issue Number: 324

Question: User ID: Do we have current Enterprise Business rules that we need to enforce, and if so, what are they? The assumption we made when discussing this was that the admin could give them whatever ID the user desired. If user wanted the ID Beavis, the admin could create it. The question is, are there some rules we want to enforce (i.e. User ID's start w/ first three characters of insurance company's name, GEI for GEICO) and some defaults for both UserID & Password? Maybe for GEICO, the first user is GEI0001 and the default password is GEICO. Just something we need to address.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - I think we should give them whatever user ID they want.
3-30-00. Kim DeVallance - user ID is a company specific item. For example, GEICO's is their associate ID (similar to our employee number). Progressive uses their PACMAN ID, Nationwide uses their RACF ID...all a similar concept. It is an ID that the adjuster is familiar with and I think we should allow the customer to use an employee number already familiar to the adjuster.
4-7-00, Issue Mtg, the field is 10 characters, First three will be company driven, the next 7 can be alpha/num and the users choice.
4-11-00, Brad Reel - Current State, ID's are first three characters of the company's name, and up to seven numeric characters. Could possibly expand to seven alpha-numeric instead of just numeric. Barring any disagreement, we will suggest the following in the ARMS Web system: first three characters of the company's name are the first three characters of the ID. Then the ID must include at least 4 alpha-numeric characters with at least one number in it. The minimum ID length would be 7 characters, the maximum 10. Suggest we try to force companies to use their employee IDs as the seven digits. ARMS Web system can generate a number if necessary.

Need to confirm with our security people that this is acceptable security on an Enterprise-owned application. Also, should consider whether or not we think first three chracters of a company's name will allow us to always uniquely identify companies.

Issue Number: 325

Question: Current State we capture the primary address for the user, (the address the user (adjuster) is located at) do we want to do the same in future state? In the screen prototype should the primary user (adjuster) address be capture in the user profile screens, given that we currently have an office address in the office profile?

Status: Closed - Resolved

Resolution: 3-30-00, Kim DeVallance - Kim-I do not think it is necessary for the ARMS/Web application, but it may be a mandatory field for the ARMS system when it processes info. I would recommend checking with the analysts from ARMS. We pull the address from ECARS when we send a paper bill, and if the bill is electronic, the address does not matter.
4-7-00, Issue Mtg, Default to office address, allow at the user level to be changed, if it is changed it will only update the database not the 400.
4-11-00, Brad Reel - When creating a user, we need to capture a user-specific address. It should default to the primary office they are assigned to when they are first created, but be changeable. This means we have to change the process for adding a user so we identify their primary office before we enter address information.

Issue Number: 326

Question: Can a user be maintained at more than one office? Do we still have a default/primary office when the user is created?
Example: You have been created at the St. Louis Office and you need to travel to California to help with a disaster, does California have the rights to maintain you.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - For tracking purposes, I think we need to maintain one profile only. If someone moves to another location because of a disaster, we should move the profile to that office. Perhaps to make it easy on the transition, we could transfer their base profile and let the new office modify accordingly.
3-27-00, Ask Brad to follow-up with Dave Smith.
3-30-00, Kim DeVallance - Current state, yes a user can be maintained at more than one office, but a user should have a primary office.

Issue Number: 327

Question: Do we need a primary office at which you see all work below you? This would apply only to people who were in offices that were not claims offices. Example: I am a regional VP (wouldn't that be cool) and I want to use the system. I define "Default One" as my region, so when I look at stuff in the system an I see all the offices under my office as my default.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - Yes, I think this a good enhancement.
3-30-00, Kim DeVallance - This would be great!!!

Issue Number: 328

Question: Do we need a primary office that you can create work at? This would apply to everyone and defines the primary office I can create work in. For an Adjuster, this would be their primary office. For someone at a higher level, it would be the office they assign work to if they create it. Following the example above, if that VP creates a res (unlikely, but work with me), this default would be the claims office it would be sent to for completion.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - Yes, I think this a good enhancement as well. 3-30-00, Kim DeVallance - Yes, but keep in mind during the life of a rental we can transfer the rental to different offices within the same company profile.

Issue Number: 329

Question: Where does the manager get assigned to a user? At the Office Level, the User Level or the Team level? Can a user have more than one manager?

Status: Closed - Resolved

Resolution: 08-08-00 - Brad Reel: Upon further discussion with the business, the process for selecting a person to handle an authorization limit is as follows: When a user hits an authorization limit, the system will request that the user select another user to approve the request and handle the rental. The system will only present users that have limits higher than the requested amount/number of days. Once the user has been selected, the rental will then be permanently transferred to the chosen user.

Issue Number: 331

Question: Under Report Layout section, is this for the office to give the user what fields that they want them to see? Then the user can set how he views these fields in MY PROFILE?

Status: Closed - Resolved

Resolution: 3-21-00, Anita Klopfenstein - It allows the user to create a default report layout as well as establish groupings. For example: I may want a team group which allows me to select adjusters to view. However, this would be a function which had to be approved in the profile of the user. Otherwise they can

only see their work.

Issue Number: 332

Question: Are the authorization limits for the life of the rental or the transaction, (as applied to use by an adjuster)

Status: Closed - Resolved

Resolution: 3-21-00, Anita Klopfenstein - Both - There is a daily limit and a rental max.
For the life of the rental.

Issue Number: 350

Question: Do we want to force a search before and admin can add a user?

Status: Closed - Resolved

Resolution: 08-07-00 - Brad Reel: When adding a user, the system will search for the UserID and ensure it does not exist. No other searches will be performed.

Issue Number: 352

Question: Where does the ability to change the language the user can view the screens in reside? With the Admin or the user?

Status: Deferred

Resolution:

Issue Number: 356

Question: When setting up a user, should the office profile restrict the user's profile? Or are the office and user profiles independant of each other?

Status: Closed - Resolved

Resolution: 08-07-00 - Brad Reel: Office profile overrides user profile. A user can have more rights than the office, but will still be restricted to only activities that can be performed in that office based on the office profile while they are working in that office.

Issue Number: 360

Question: Brad Decoder, Password/ do we send e-mail to the admin to let them know how many times login failed?

Status: I2 User Review

Resolution:

Issue Number: 365

Question: Do we need a batch process for adding users?

Status: Closed - Resolved

Resolution: 07-03-00 - Brad Reel: This question has also been asked in the more general setting of "Should a process exist for walking a user through setting up an entire company (much like a wizard tool)." For this release of ARMS Web (V2.0) a batch process for creating users will not be created. There will also not be a wizard for creating a company. However, for future releases, this wizard will be a very worthwhile tool to create and should be incorporated into future releases.

Enterprise Rent-A-Car

Functional Design Specification
Maintain User

Version 1.3

Last Saved: 8/18/00 1:02 PM

Revision History

Date	Issue	Description	Author
3/29/00	1.0	Subdocuments merged into master document	Brad Reel, Anil Kabra, Russ Dittmar, Deborah Ealick, Johnny Sands, Gary Thomae, Cindy Bastean
4/4/00	0.2	Revisions after cross team review and inter-team final review	Brad Reel, Deborah Ealick, Cindy Bastean
July 5, 2000	1.0	Re-write to update based on iteration one feedback	Brad Reel
September 15, 2000	1.2	Modified to reflect resolved issues	Brian Weingart
September 25, 2000	1.3	Updated screens and specs	Brian Weingart

Table of Contents

Maintain User

1. Maintain User Use Case

1.1 Brief Description

The Maintain User use case describes how a USER would set up or maintain a user in the ARMS Web system.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ENTERPRISE ADMINISTRATOR** – The ENTERPRISE ADMINISTRATOR is a person who can perform this use case to set up any user in a company.

- *COMPANY ADMINISTRATOR* – *The COMPANY ADMINISTRATOR is a person who can perform this use case for the company. They may add users and assign them to office(s) that they are the administrator of within the company.*

- **OFFICE ADMINISTRATOR** – The OFFICE ADMINISTRATOR is a person who can perform this use case for the company. The OFFICE ADMINISTRATOR may maintain any user in their company structure to which they have been assigned ownership.
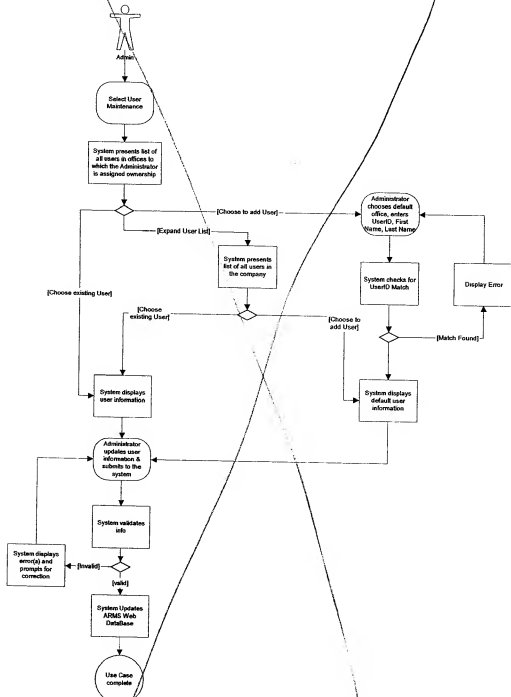
1.3 Pre-Conditions

- The USER must be logged into the system.
- If maintaining a user, the USER should have the ability to maintain that user. In order to maintain a user at a specific office, the ADMINISTRATOR must have access to that specific office.
- If adding a user, the USER should have the ability to add a user.

1.4 Flow of Events

The Flow of Events will include all the steps necessary to add or maintain a company user in the ARMS Web system.

1.4.1 Activity Diagram

Maintain User Activity Diagram

Admin

Select User
Maintenance

System presents list of
all users in offices to
which the Administrator
is assigned ownership

[Choose to add User]

[Expand User List]

Administrator
chooses default
office, enters
UserID, First
Name, Last Name

System presents
list of all users in
the company

System checks for
UserID Match

Display Error

[Choose existing User]

[Choose
existing User]

[Choose to
add User]

[Match Found]

System displays
user information

System displays
default user
information

Administrator
updates user
information &
submits to the
system

System validates
info

System displays
error(s) and
prompts for
correction

[Invalid]

[Valid]

System Updates
ARMS Web
DataBase

Use Case
complete

9/14/00

Y:\APPS\ARMSWeb\Application\@dkb\ARMS Web\Release One\PR-Profiling\PR-05-Maintain
User\ACTIVITY DIAGRAMS\PR-05 MAINTAIN USER.VSD

1.4.2   Basic Flow

The Basic Flow will describe how a USER will maintain a user in the ARMS Web system.

1. The USER will choose to maintain user(s).
2. The system will present a list of all users that are in all the offices the USER has access to maintain.
3. The USER will choose a user to maintain.
4. The system will display the user's information for the USER to edit.
5. The USER will update the user's information and submit the information to the system.
6. The system will validate the information entered.
7. The system will update the ARMS Web database.
8. This ends the use case.

1.4.3   Alternative Flows

1.4.3.1   Add User

At step three in the Basic Flow, the USER may choose to add a user, if they have the authority level to do so. The USER will enter a primary office, UserID, First Name and Last Name for the new user. The system will then validate that the office was entered and the UserID does not exist. If a UserID match is found, or the office was not entered, the system will display an error and request the USER enter a new UserID. Otherwise, the system will display the default settings for a new user; the USER will update the default settings and submit the information to the system. The system will validate the information entered, and update the ARMS Web database. The use case is then complete.

1.4.3.2   Show All Users for the Company

At step three in the Basic Flow, the USER may choose to display all users within the company. This would allow for adding users to offices the USER controls. The USER will choose the user they wish to work with and the system will then display the user's information; the USER will add the user to any offices the USER controls and submit the information to the system. The system will validate the information entered, and update the ARMS Web database. The use case is then complete.

1.4.3.2.1   If a user's primary office is not an office controlled by the USER, the USER may only add the user to offices the USER controls. The USER should not be able to change any of the user's settings. A USER that has control of a user's primary office can only change user settings.

1.4.3.3   User Information Validation Fails

In step six of the Basic Flow, the system may find that user information entered by the USER does not meet the validation criteria. The system should return the USER to step four of the Basic Flow, show the USER the invalid data, and prompt the USER to reenter the data.

This rule also applies for new user creation. Whenever a new user is submitted to the system for creation, the system must validate that the criteria entered is valid. If any information is invalid, the system should present the invalid date to the USER, and prompt the user to correct it.

1.4.3.3.1   The following fields must be populated to complete a user update or new user creation.
- Last Name
- First Name
- UserID (Must be validated to ensure it is not a duplicate ID)
- Home Office (Must be a valid office and not null)

1.4.3.4   Cancel Add / Maintain User

Until step five in the Basic Flow, the USER may choose to cancel the use case. The system

should not store any changes made by the USER within the use case.

1.5 Post-Conditions

- If the use case was successful and the USER was maintaining a user, the user criteria being changed will have been changed and updated in the ARMS Web system.
- If the use case was successful and the USER was adding a user, the user will have been added in the ARMS Web system.
- If the use case was unsuccessful, the system state will be unchanged.

1.6 Special Requirements

1.6.1 User Inactivation

In order to inactivate a user, the following set of criteria must be validated. If any of the criteria are found to be true, then the system will not allow the USER to inactivate the user.

- If A4XREFL1/X4STCD is equal to 'C' (closed rental) and any tickets were closed in the past seven days

- If A4XREFL1/X4STCD is equal to 'A' (audited invoice)

- If A4XREFL1/X4STCD is equal to 'R' (reservation)

- If A4XREFL1/X4STCD is equal to 'O' (open contract)

- If A4XREFL1/X4STCD is equal to 'U' (unconfirmed) and A4XREFL1/X4RSFG is equal to 'D' (Direct Bill request)

- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'C' (extension request & message sent)

- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'M' (authorization message sent)

- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'X' (extension request sent)

- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'B' (invoice sent from ARMS)

- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'R' (invoice returned to adjuster)

- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'E' (rejected system error)

- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'Q' (rejected invoice ARMS researching)

1.6.2 User Default Settings

Whenever a new user is created, the settings for that user should be defaulted based on the user's primary office profile settings. For example, if the office is a reservation only office, the user should default to reservation only. This does not imply that the administrator cannot change the settings. This should also apply to whether can receive work setting should be on or off for the user/team. If all other users/teams in the office have the setting either on or off, then the new user should mimic this setting. Once again, this does not imply that the administrator cannot change this setting.

1.7 Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Create or Modify User

This screen will allow the USER to search for and select a user to modify or select to add a new user.

2.1.1 Screen Layout

2.1.2 Create or Modify User

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
New Team	Radio Button	1	Create a New Team		
New User	Radio Button	1	Create a New User Indicator		
User ID:	Input	10	User Id	ARMS Profile ID	
First Name:	Input	15	First Name of New User	First Name	
Handling For	Output	30	Handling For	First Name + Last Name	
Last Name:	Text Box	20	Last Name of New User	Last Name	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
User ID	Output	10	List of User Ids within the company	Adjustor Code	
Name	Output	30	List of Users within a Company	First Name + Last Name	
User ID:	Input	10	User Id	Adjustor Code	
Primary office	List Box	25	Primary office	external organization name	
Primary office	Output	10	List of Primary offices	external organization abbreviated name	
Office Description	Output	20	List of Office Descriptions within Company	external organization name	
Office:	Output	4	Office Id	external organization abbreviated name	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 A – Z Anchor Links

When any of the letters are clicked, the list of users should position itself with that letter presented at the top of the user view area on the page.

2.1.3.2 Teams Link

When the team link is clicked, the list of teams should position itself at the top of the view area on the page. The list of teams should be placed last in the list of all users/teams.

2.1.3.3 Process

When the Process button is clicked, the system should check to see that the appropriate information was entered in order to create a new user (Office, Last Name, First Name UserID). If the information is entered, the system will create a new user with those attributes and the other user attributes defaulted. The system should then display the new user's profile.

2.2 Create or Modify Team

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.2.1 Screen Layout

2.2.2 Create or Modify Team

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
New Team	Radio Button	1	Create a New Team		
New User	Radio Button	1	Create a New User		
Name	Output	20	Adjusters Associated with the Company	First Name + Last Name	
Handling For	Output	20	Handling For	First Name + Last Name	
User ID	Output	7	List of User Ids Associated with a Company	Adjustor Code	
Primary office	List Box	20	Primary office associated with Team	external organization abbreviated name	
Primary office	Output	10	List of Primary offices Associated with a Company	external organization abbreviated name	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Office Description	Output	20	List of Office Descriptions associated with a comp	external organization name	
Office	Output	10	Office	external organization abbreviated name	
Team Name	Input	15	Team Name	external organization name	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 A – Z Anchor Links

When any of the letters are clicked, the list of users should position itself with that letter presented at the top of the user view area on the page.

2.2.3.2 Teams Link

When the team link is clicked, the list of teams should position itself at the top of the view area on the page. The list of teams should be placed last in the list of all users/teams.

2.2.3.3 Process

When the Process button is clicked, the system should check to see that the appropriate information was entered in order to create a new team (Office, Team Name). If the information is entered, the system will create a new team with those attributes and the other user attributes defaulted. The system should then display the new team's profile.

2.3   User Profile

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.3.1   Screen Layout

Welcome to the
Automated Rental Management System

create a
RESERVATION   find a
CUSTOMER

Claims Office: 001   Handling for: Yourself

Administration:
MODIFY USER

User Information:

Office:

```
001
002
003
004
005
```

Selected Office

=

Authorizations:

Work Authority:

Top of page

Contact Us | Terms & Conditions | Log Off

2.3.2   User Profile

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Reset Password	Check Box	1	Reset Password Indicator		

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Email Address:	Text Box	15	Adjuster's Email Address	e-Mail address	
First Name	Text Box	15	First Name	First Name	
Handling For	Output	10	Handling For	First Name + Last Name	
Last Name	Text Box	10	Last Name	Last Name	
User ID:	Output	0	User Id	Adjustor Code	
Active	Check Box	1	User is Active	Status:Active/Inactive	
Address	Output	25	Home Office Address	Customer Address Line 1+ Customer Address Line 2	
Phone:	Output	10	Home Office Phone Number	Customer Phone Number + Customer Phone Extension	
Postal	Output	10	Home Office Postal Code	Zip Code	
City	Output	15	Home Office City	customer city text	
ST/PROV	Output	5	Home Office State	customer state code	
Office	Output	10	Office	external organization abbreviated name	
Home Office	List Box	20	Office Name	external organization name	
Other authorized Offices	List Box	20	Other authorized Offices for The User	external organization name	
Allow files and action items to be assigned to this user	Check Box	1	Allow files &\action items to be assigned to user	profile type value code	If Allow Files and Action Items have been selected, this user or team will appear in the Handle For list.
Authorize/Extend Rental	Check Box	1	Allow user to Authorize/Extend Rental	profile type value code	
User Maintence	Check Box	1	Allow user to conduct user maintenance	profile type value code	
Create Reservation	Check Box	1	Allow user to create reservation	profile type value code	
Reporting (Management)	Check Box	1	Allow user to do reporting	profile type value code	
Pay Invoice	Check Box	1	Allow user to Pay Invoices	profile type value code	
Days/Rental	Text Box	10	Authorization Limit on Days per Rental	profile type value quantity	
$ ____ max/rental	Text Box	10	Authorization Limit on Maxmimum Dollars per Rental	profile type value amount	

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 Process

When clicked, the system will ensure that all rules on the page are enforced. Upon completion, the system will return the USER to the Create a New User / Team page.

2.3.3.1.1 The user must have a First Name, Last Name and Home Office entered. The Home Office must be a valid office for that company.

2.3.3.1.2 Work Authority for each user will default to all enabled.

2.3.3.1.3 If the Active switch has been set to inactive, the system will check to see if the user owns any open work. If the user owns work, the system will not allow the user to be set to inactive. The system will notify the USER that the user has open work assigned to them and request that they transfer the work before attempting to inactivate the user.

2.3.3.1.4 If the reset password option is set, the system will reset the user's password. This will reset the user's password to the password used for new users. **Need to verify what that password is.**

2.3.3.1.5 If the File Ownership flag is turned off, the system will check to see if the user owns any open work. If the user owns work, the system will not allow the file ownership flag to be turned off. The system will notify the USER that the user has open work assigned to them and request that they transfer the work before attempting to turn off file ownership.

2.4 Team Profile

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.4.1 Screen Layout

2.4.2 Create or Modify Team

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Allow files and ction items to be assigned to this team	Check Box	1	Allow action items to be assigned to team		
Available	List Box	30	Available Members for Team	First Name + Last Name	
E-mail Address	Text Box	20	Email Address	e-Mail address	
Handling For:	Output	20	Handling For:	First Name + Last Name	
Active	Check Box	1	Team Active Indicator	Status:Active/Inactive	
Team Members	List Box	30	Team Members	First Name + Last Name	
Phone Number	Output	10	Branch Office Phone Number	Customer Phone Number + Customer Phone Extension	
Postal	Output	10	Branch Office Postal Code	Zip Code	
Address	Output	25	Home Office Address	Customer Address Line 1 + Customer Address Line 2	
ST/PROV	Output	3	Branch Office State or Province	customer state code	
City	Output	15	Home Office City	customer city text	
Home Office	Output	20	Home Office Name	external organization name	
Office	Output	5	Office	external organization abbreviated name	
Team Name	Text Box	20	Team Name	external organization name	

2.4.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.4.3.1 Process

When clicked, the system will ensure that all rules on the page are enforced. Upon completion, the system will return the USER to the Create a New User / Team page.

2.4.3.1.1 The team must have a Team Name and Home Office entered. The Home Office must be a valid office for that company.

2.4.3.1.2 If the Active switch has been set to inactive, the system will check to see if the team owns any open work. If the team owns work, the system will not allow the team to be set to inactive. The system will notify the USER that the team has open work assigned to them and request that they transfer the work before attempting to inactivate the team.

2.4.3.1.3 If the File Ownership flag is turned off, the system will check to see if the team

owns any open work. If the team owns work, the system will not allow the file ownership flag to be turned off. The system will notify the USER that the team has open work assigned to them and request that they transfer the work before attempting to turn off file ownership. If the user or team does not receive File Ownership, that user or team will not display in the Handle For list.

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Build list of Users

(Office Id, First Name, Last Name, User ID)
Build a list of User first and last names NOT limited to a given office in order to search for a user. Limited by the first or last name passed.

3.2 Find User Information

(User Id)
Retrieve the current values for a user's profile.

3.3 Update User Information

(User Id, Name, e-mail Address, Out of Office, Handler for out of office user, Initial Page, Is user Multi-company, Is User Active, Current Password, New Password, Receive Authorization Assignment)
Update the given data values for the user profile.

3.4 Build list of User offices

(User Id)
Build a list of office names for the offices the user is assigned to.

3.5 Find User Office Information

(User Id, Office Id)
Retrieve the current values assigned for the user at a given office.

3.6 Update User Office Information

(User Id, Office Id, and data values)
Update the given data values for the user profile.

3.7 Add User Office Information

(User Id, Office Id)
Assign user access to another office. Default values are set for the users access.

3.8 Remove User Office Information

(User Id, Office Id)
Revoke assignment of the user to an office. The user cannot be revoked from their primary office

3.9 Build a list of users to which the administrator has access

(Company ID, Administrator ID, User ID)
Build a list of User first and last names limited to a given office in order to maintain a user. Limited by the first or last name passed.

3.10 Validate that User ID does not exist

(User ID)
Verify that the administartor must add a new user.

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

4.1.1 User Language Preference

This is the user's language preference while working with the ARMS Web System.

Data Field Type:	Alpha-Numeric
Data Field Length:	10
Data Source:	<Data Source>

4.1.2 Phone Number

This is the user's phone number.

Data Field Type:	Alpha-Numeric
Data Field Length:	10
Data Source:	<Data Source>

4.1.3 Profile Attribute Id

I.S. assigned identifier for a profile attribute. Must be unique and non-blank. Each profilable item will have a profile attribute.

Data Field Type:	Alpha-Numeric
Data Field Length:	20
Data Source:	<Data Source>

4.1.4 Last Name

This is the last name of the user.

Data Field Type:	Alpha-Numeric
Data Field Length:	20
Data Source:	<Data Source>

4.1.5 Handler for out of office user

This is the user who will handle work for the user who is out of office.

Data Field Type:	Alpha-Numeric
Data Field Length:	0
Data Source:	<Data Source>

4.1.6 Start Page

This is the initial page that the user will see when he logs on to the system.

Data Field Type:	URL
Data Field Length:	256
Data Source:	<Data Source>

4.1.7 Is user out of office ?

This flag indicates that the user is out of office and no work should be assigned to them. Instead another user can be set up to handle for the user who is out of office.

Data Field Type:	Boolean
Data Field Length:	1
Data Source:	<Data Source>

4.1.8 Is the user multicompany ?

This flag indicates that this user can do work for multiple insurance companies. These are typically Enterprise Rent-A-Car employees working on site at an insurance company office or Rental Management Services employees who are also Enterprise employees who manage rentals for the insurance company but are not on site.

Data Field Type:	Boolean
Data Field Length:	1
Data Source:	<Data Source>

4.1.9 Can user receive work ?

This flag indicates that user can receive work (e.g. requests for authorization, requests for extension etc.). Typically a manager would set this flag to "No" so that work would not be assigned to him or her although he or she could be notified in certain situations like authority limit exceeded etc.

Data Field Type:	Boolean
Data Field Length:	1
Data Source:	<Data Source>

4.1.10 Is User Active ?

This flag indicates the user is currently active and may log on to the system to do work.

Data Field Type:	Boolean
Data Field Length:	1
Data Source:	<Data Source>

4.1.11 Email Address

This is the email address of the user.

Data Field Type:	Alpha-Numeric
Data Field Length:	30
Data Source:	<Data Source>

4.1.12 First Name

This is the first name of the user.

Data Field Type:	Alpha-Numeric
Data Field Length:	15
Data Source:	<Data Source>

4.1.13 Password

This is the user specified password that the user will use along with the user id to log on to the ARMS Web System.

Data Field Type:	Password
Data Field Length:	10
Data Source:	<Data Source>

4.1.14 User Id

This is the user id that the user will use to sign on to the ARMS Web System. This id must be unique across the whole system.

Data Field Type:	Alpha-Numeric
Data Field Length:	10
Data Source:	<Data Source>

5. Questions and Answers

Issue Number: 321

Question: When do we "Kill" profiles that have been created but not used?
Question 2 - Do we allow for deleting users, and if so, who would handle this function? Question 3 - Do we allow for deleting inactive user, and if so, who would handle this function?

Status: Closed - Resolved

Resolution: 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out? 08-07-00 - Brad Reel: UserIDs that were created, but never accessed will be made inactive after six months. UserIDs that have not been accessed for two years will also be made inactive. After being made inactive, they will be purged after three additional months.

Issue Number: 322

Question: Do we allow for deleting users, and if so who would it be that does so?

Status: Closed - Merged

Resolution: 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out? 3-27-00, merged with Issue 321

Issue Number: 323

Question: When do we delete an inactive user? And who would handle?

Status: Closed - Merged

Resolution: 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out? 3-27-00, merged with issue 321

Issue Number: 324

Question: User ID: Do we have current Enterprise Business rules that we need to enforce, and if so, what are they? The assumption we made when discussing this was that the admin could give them whatever ID the user desired. If user wanted the ID Beavis, the admin could create it. The question is, are there some rules we want to enforce (i.e. User ID's start w/ first three characters of insurance company's name, GEI for GEICO) and some defaults for both UserID & Password? Maybe for GEICO, the first user is GEI0001 and the default password is GEICO. Just something we need to address.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - I think we should give them whatever user ID they want.
3-30-00. Kim DeVallance - user ID is a company specific item. For example, GEICO's is their associate ID (similar to our employee number). Progressive uses their PACMAN ID, Nationwide uses their RACF ID...all a similar concept. It is an ID that the adjuster is familiar with and I think we should allow the customer to use an employee number already familiar to the adjuster.
4-7-00, Issue Mtg, the field is 10 characters, First three will be company driven, the next 7 can be alpha/num and the users choice.
4-11-00, Brad Reel - Current State, ID's are first three characters of the company's name, and up to seven numeric characters. Could possibly expand to seven alpha-numeric instead of just numeric. Barring any disagreement, we will suggest the following in the ARMS Web system: first three characters of the company's name are the first three characters of the ID. Then the ID must include at least 4 alpha-numeric characters with at least one number in it. The minimum ID length would be 7 characters, the maximum 10. Suggest we try to force companies to use their employee IDs as the seven digits. ARMS Web system can generate a number if necessary.

Need to confirm with our security people that this is acceptable security on an Enterprise-owned application. Also, should consider whether or not we think first three characters of a company's name will allow us to always uniquely identify companies

Issue Number: 325

Question: Current State we capture the primary address for the user, (the address the user (adjuster) is located at) do we want to do the same in future state? In the screen prototype should the primary user (adjuster) address be capture in the user profile screens, given that we currently have an office address in the office profile?

Status: Closed - Resolved

Resolution: 3-30-00, Kim DeVallance - Kim-I do not think it is necessary for the ARMS/Web application, but it may be a mandatory field for the ARMS system when it processes info. I would recommend checking with the analysts from ARMS. We pull the address from ECARS when we send a paper bill, and if the bill is electronic, the address does not matter.
4-7-00, Issue Mtg, Default to office address, allow at the user level to be changed, if it is changed it will only update the database not the 400.
4-11-00, Brad Reel - When creating a user, we need to capture a user-specific address. It should default to the primary office they are assigned to when they are first created, but be changeable. This means we have to change the process for adding a user so we identify their primary office before we enter address information.

Issue Number: 326

Question: Can a user be maintained at more than one office? Do we still have a default/primary office when the user is created?
Example: You have been created at the St. Louis Office and you need to travel to California to help with a disaster, does California have the rights to maintain you.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - For tracking purposes, I think we need to maintain one profile only. If someone moves to another location because of a disaster, we should move the profile to that office. Perhaps to make it easy on the transition, we could transfer their base profile and let the new office modify accordingly.
3-27-00, Ask Brad to follow-up with Dave Smith.
3-30-00, Kim DeVallance - Current state, yes a user can be maintained at more than one office, but a user should have a primary office.

Issue Number: 327

Question: Do we need a primary office at which you see all work below you? This would apply only to people who were in offices that were not claims offices. Example: I am a regional VP (wouldn't that be cool) and I want to use the system. I define "Default One" as my region, so when I look at stuff in the system an I see all the offices under my office as my default.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - Yes, I think this a good enhancement.
3-30-00, Kim DeVallance - This would be great!!!

Issue Number: 328

Question: Do we need a primary office that you can create work at? This would apply to everyone and defines the primary office I can create work in. For an Adjuster, this would be their primary office. For someone at a higher level, it would be the office they assign work to if they create it. Following the example above, if that VP creates a res (unlikely, but work with me), this default would be the claims office it would be sent to for completion.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - Yes, I think this a good enhancement as well. 3-30-00, Kim DeVallance - Yes, but keep in mind during the life of a rental we can transfer the rental to different offices within the same company profile.

Issue Number: 329

Question: Where does the manager get assigned to a user? At the Office Level, the User Level or the Team level? Can a user have more than one manager?

Status: Closed - Resolved

Resolution: 08-08-00 - Brad Reel: Upon further discussion with the business, the process for selecting a person to handle an authorization limit is as follows: When a user hits an authorization limit, the system will request that the user select another user to approve the request and handle the rental. The system will only present users that have limits higher than the requested amount/number of days. Once the user has been selected, the rental will then be permanently transferred to the chosen user.

Issue Number: 331

Question: Under Report Layout section, is this for the office to give the user what fields that they want them to see? Then the user can set how he views these fields in MY PROFILE?

Status: Closed - Resolved

Resolution: 3-21-00, Anita Klopfenstein - It allows the user to create a default report layout as well as establish groupings. For example: I may want a team group which allows me to select adjusters to view. However, this would be a function which had to be approved in the profile of the user. Otherwise they can

only see their work.

Issue Number: 332

Question: Are the authorization limits for the life of the rental or the transaction, (as applied to use by an adjuster)

Status: Closed - Resolved

Resolution: 3-21-00, Anita Klopfenstein - Both - There is a daily limit and a rental max.
For the life of the rental.

Issue Number: 350

Question: Do we want to force a search before and admin can add a user?

Status: Closed - Resolved

Resolution: 08-07-00 - Brad Reel: When adding a user, the system will search for the UserID and ensure it does not exist. No other searches will be performed.

Issue Number: 352

Question: Where does the ability to change the language the user can view the screens in reside? With the Admin or the user?

Status: Deferred

Resolution:

Issue Number: 356

Question: When setting up a user, should the office profile restrict the user's profile? Or are the office and user profiles independant of each other?

Status: Closed - Resolved

Resolution: 08-07-00 - Brad Reel: Office profile overrides user profile. A user can have more rights than the office, but will still be restricted to only activities that can be performed in that office based on the office profile while they are working in that office.

Issue Number: 360

Question: Brad Decoder, Password/ do we send e-mail to the admin to let them know how many times login failed?

Status: I2 User Review

Resolution:

Issue Number: 365

Question: Do we need a batch process for adding users?

Status: Closed - Resolved

Resolution: 07-03-00 - Brad Reel: This question has also been asked in the more general setting of "Should a process exist for walking a user through setting up an entire company (much like a wizard tool)." For this release of ARMS Web (V2.0) a batch process for creating users will not be created. There will also not be a wizard for creating a company. However, for future releases, this wizard will be a very worthwhile tool to create and should be incorporated into future releases.

Enterprise Rent-A-Car

Functional Design Specification
User Profile

Version 1.0

Last Saved: 8/18/00 9:53 AM

Revision History

Date	Issue	Description	Author
3/29/00	1.0	Combined subdocuments with master document. Gathered data directly from databases.	Brad Reel, Anil Kabra, Russ Dittmar, Johnny Sands, Gary Thomae, Deborah Ealick, Cindy Bastean
4/5/00	0.2	Revised per cross-team and intra-team final evaluations	Cindy Bastean, Deborah Ealick, Brad Reel
July 6, 2000	1.0	Revised to reflect iteration one review and other items discovered during development.	Brad Reel
August 18, 2000	1.0	Updated all issues.	Brad Reel

Table of Contents
User Profile

1. User Profile Use Case

1.1 Brief Description

The User Profile use case describes how the USER would customize their working environment. User Profile will allow the USER to change their password, set his or her out of office, and modify their Favorite Locations list.

1.2 Use Case Actors

Actors will use this use case to update their user profile. The following actors will interact with this use case:

- **ENTERPRISE ADMINISTRATOR**
- **COMPANY ADMINISTRATOR**
- **OFFICE ADMINISTRATOR**
- **CLAIMS MANAGER**
- **ADJUSTER**
- **FIRST NOTICE OF LOSS ADJUSTER**
- **PROCESSOR**

1.3 Pre-Conditions

- The company must be enrolled in ARMS Web.
- The USER must be enrolled and have an active User ID and password.
- The USER must be logged into the ARMS Web system.

1.4 Flow of Events

The Flow of Events will include the necessary steps to make changes and updates to "My Profile"

1.4.1 Activity Diagram - see Figure E.67
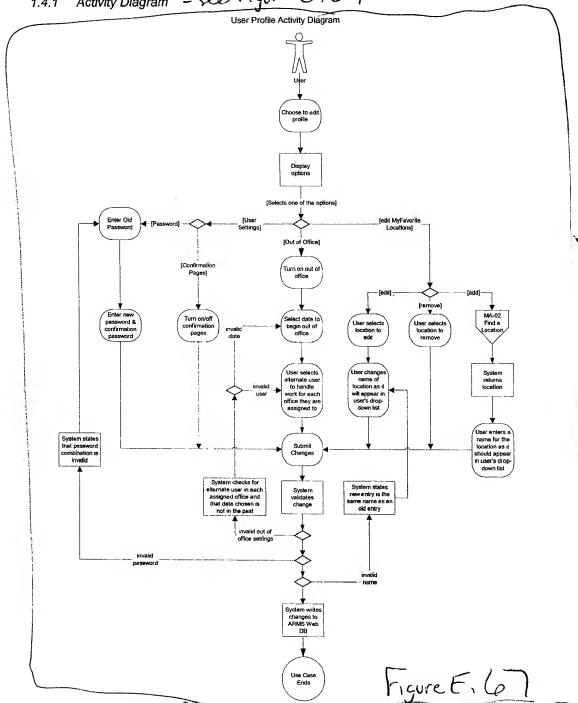
User Profile Activity Diagram

Move to sep. figure

Figure E.67

W:\SCORP00\CORP_PUBLIC\APPS\ARMSWebApplication\Prod\ARMS Web\Release One\PR-Profile\PR-07 User Profile\ACTIVITY DIAGRAM\PR-07 MY PROFILE.VSD

5/4/00

1.4.2 Basic Flow

1. The USER will choose to edit their User Profile.
2. The system will display the USER'S User Profile
3. The USER will specify the action they would like to perform (user settings, set out of office, add a Favorite Location, remove a Favorite Location, edit a Favorite Location).
4. The USER will select one of the options.
5. Based on the USER'S response, one or more of the following subflows is executed:
   - If the USER chooses to edit a Favorite Location, the Edit Favorite Location Subflow is executed.
   - If the USER chooses to add a Favorite Location, the Add Favorite Location Subflow is executed.
   - If the USER chooses to remove a Favorite Location, the Remove Favorite Location Subflow is executed.
   - If the USER chooses to set the Out of Office Function, the Out of Office Subflow is executed.
   - If the USER chooses to Change Password, the Change Password Subflow is executed.
   - If the USER chooses Confirmation Page, the Confirmation Page Subflow is executed.

1.4.2.1 Edit Favorite Location Subflow

This subflow allows the USER to edit a location on their Favorite Locations List.

1. The USER selects the location they wish to edit from their Favorite Locations List.
2. The USER changes the name they wish to use to identify the location. This is the name that will be displayed to them in their Favorite Locations List.
3. The USER submits the information to the system.
4. The system updates ARMSWeb to reflect the new Favorite Location.
5. The use case ends.

1.4.2.2 Add Favorite Location Subflow

This subflow allows the USER to add a location to the Favorite Locations List.

1. The USER will execute Functional Specification MA-02: Find a Rental Location to search for the location they would like to add to their Favorite Locations List.
2. The USER selects the location they wish to add to their Favorite Locations List.
3. The USER enters the name they wish to use to identify the location. This is the name that will be displayed to them in their Favorite Locations List.
4. The USER submits the information to the system.
5. The system updates ARMSWeb to reflect the new Favorite Location.
6. The use case ends.

1.4.2.3 Remove Favorite Location Subflow

This subflow allows the USER to remove a location from their Favorite Locations List.

1. The USER selects the location they wish to remove from their Favorite Locations List.
2. The USER submits the information to the system.
3. The system updates ARMSWeb to reflect the removal of the Favorite Location.
4. The use case ends.

1.4.2.4 Out Of Office Subflow

This subflow allows the USER to select when they are out of office and assigns their workload to another USER.

1. The USER will set choose to be Out of Office
2. The USER will enter the beginning date of when they will be Out of Office.

3. The USER will choose an alternate USER to handle their work for each office the USER is assigned to.
4. The USER submits the information to the system.
5. The system validates the changes.
6. The system updates ARMSWeb database to reflect the out of office status. At this time, the system will assign any work that exists for the USER to the chosen user(s). Any new work that is assigned to the USER will automatically be reassigned by the system to the chosen user(s).
7. The use case ends.

1.4.2.5 Change Password Subflow

This subflow allows the USER to change their current password.

1. The USER enters the old password.
2. The USER enters the new password of their choice.
3. The USER re-enters new password for verification.
4. The USER submits the passwords to the system.
5. The system validates the password changes.
6. The system updates ARMSWeb to reflect the new password changes.
7. The use case ends.

1.4.2.6 Confirmation Page

This subflow allows the USER to turn on or off confirmation pages in the ARMS Web system.

8. If Confirmation pages have been turned off, the user will turn them on.
9. If Confirmation pages have been turned on, the user will turn them off.
10. The USER submits the change to the system.
11. The system updates ARMSWeb to reflect the change.
12. The use case ends.

1.4.3   Alternative Flows

1.4.3.1 Invalid Password

At step five in the Change Password Subflow, if the current password is incorrect or if the confirmed password does not match the new password, the system will prompt the USER to re-enter the old, the new and the confirmation password.

1.4.3.1.1 It will be considered invalid if the new password entered was one of the USER'S last five ARMSWeb passwords.

1.4.3.1.2 It will be considered invalid if the new password is not at between six and 10 characters and alphanumeric in type. **Validate 1.4.3.1.1 & 1.4.3.1.2 in Sign-on.**

1.4.3.2 Alternate Users not Chosen in Each Office USER is Assigned

At step five in the Out of Office Subflow, the system will validate that a user was selected to handle the USER'S work in each office the USER is assigned to. If a user was not chosen for each office, the system will notify the USER that they must select a user to handle their work in each office they are assigned to. The system will then return the USER to step two of the Out of Office Subflow.

1.4.3.3 Out of Office Start Date is in the Past

At step five in the Out of Office Subflow, the system will validate that a user selected an out of office date that is present (today) or in the future. If the date is in the past, the system will generate an error and ask the USER to enter a date that is either today or in the future. The system will then return the USER to step two of the Out of Office Subflow.

1.4.3.4 Favorite Location Name Entered is the same as an Existing Location

When the USER submits the name for a new location, or changes the name of an existing location, the system will validate that the name entered is not an exact duplicate of any other name in that USER'S list of Favorite Locations. If the name is a duplicate, the system will prompt the USER to enter a different name for the location in question. The system will then return the USER to step one of the Edit Favorite Location Subflow.

1.4.3.5 Cancel User Profile

At any point during the use case up until a change has been submitted to the system, the USER may decide to not update their profile.

1.5 Post-Conditions

- If the use case was successful then either a new password has been assigned, the out of office function will be turned on, or the USER'S Favorite Locations will be edited.
- If the use case was unsuccessful then the system will remain unchanged.

1.6 Special Requirements

None.

1.7 Extension Points

None.

2.   Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1   My Profile

This screen will allow the USER to pick which functions that they wish to change.

2.1.1   Screen Layout – My Profile – see Figur E.68

Figure E.68

2.1.2 My Profile

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Remove This Branch	Check Box	1	Delete branch from preferred locations indicator		
First Day Out:	List Box	10	Out of office start date		Three drop downs: month, day, year
Off	Radio Button	1	Select feature setting		
On	Radio Button	1	Select feature setting		
Off	Radio Button	1	Show confirmation page		
On	Radio Button	1	Show confirmation page?		
Confirm Password:	Text Box	0	Password	change password	N/A.
New Password:	Text Box	0	Password	change password	N/A.
Adjuster:	List Box	30	Handler for out of office user	First Name + Last Name	
Handling For	Output	15	Handling For Adjuster	First Name + Last Name	
Old Password:	Text Box	0	Password	User Paswd	N/A.
Address	Output	30	Preferred Location Address	Address Line + AddressLine2	
Office	Output	10	Claims Office	external organization abbreviated name	
Office:	Output	10	Handler for out of office adjuster's office	external organization abbreviated name	
Name	Input	30	Preferred Location Name	location name	Defaults to address name

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Process

When clicked, the system will validate the information on the screen is correct and complete. If an error is found the screen will be redisplayed with a message indicating the error condition and highlighting the field in error. If no errors are found, the database will be updated with the new information.

2.1.3.2 Add A Different Office

When clicked, the system will take the USER to MA-02-Find Rental Location Use Case. Here, the USER will select a new location to add to the preferred location list, and then return to the PR-07-User Profile Use Case. The new information will be validated and the database will be updated.

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Retrieve User Profile

(User Id)

Retrieve user's current profile settings.

3.2 Update User Profile

(User Id, Out of Office, Assigned Adjuster, Start Page)

Update user's Out of Office status, Adjuster to handle work during out of office period, and the user's initial page.

3.3 Change Password

(Current Password, New Password, New Password Confirmation)

Change the user's password from the current password to the new password. Validate that the current password is correct.

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

4.1.1 Handler for out of office user

This is the user who will handle work for the user who is out of office.

Data Field Type:	Alpha-Numeric
Data Field Length:	0
Data Source:	<Data Source>

4.1.2 Start Page

This is the initial page that the user will see when he logs on to the system.

Data Field Type:	URL
Data Field Length:	256
Data Source:	<Data Source>

4.1.3 Is user out of office ?

This flag indicates that the user is out of office and no work should be assigned to them. Instead another user can be set up to handle for the user who is out of office.

Data Field Type:	Boolean
Data Field Length:	1
Data Source:	<Data Source>

4.1.4 Password

This is the user specified password that the user will use along with the user id to log on to the ARMS Web System.

Data Field Type:	Password
Data Field Length:	10
Data Source:	<Data Source>

5.   Questions and Answers

Issue Number: 334

Question: Is out of office assigned at the user level or at the office level? (Could you set this for each office you work out of?) Example: You have been created at the St. Louis Office and you need to travel to California to help with a disaster, does California have the rights to maintain you.

Status: Closed - Resolved

Resolution: 4-7-00, Issue Mtg, Defer to user review I2
08-07-00 - Brad Reel: A user will be required to set their out of office function for all offices they are assigned to in order to activate the function. The function is set up using the assumption that a user would only be out of office if they were unreachable at all offices (vacation, training, etc.). Since the system can be accessed from any web connection, it is possible for a user to do work for any and all offices they are assigned to from anywhere. Therefore, it seems logical that a user would only set their out of office function if they were not available in any capacity.

Issue Number: 335

Question: Does a user have the field level control of the fields he can see?

Status: Closed - Resolved

Resolution: 4-7-00, Issue Mtg, Should be set at the Office level, the user should not be able to set the field that they want to see.
4-11-00, Brad Reel - User does not need to have control over the fields they see. Control at the office (or team level, where applicable) is sufficient

Issue Number: 336

Question: Are we still using the "Requests to be Processed" page. (the Command Center) as an option for a start up page?

Status: Future

Resolution: 4-7-00, Issue Mtg, Defer to future release, We are not sure that it will not be an option, right now it is not.

4-11-00, Brad Reel - As of right now, the "Command Center" page (Requests to be Processed) should not be an option for the start page, and is not even planned for the ARMS Web system.

Issue Number: 434

Question: 07-06-00 - Brad Reel: The ARMS Web redesign has a requirement that the system would allow the user to choose the page in the system they could use as their start-up page. Their options were: the Command Center Page, the Action Items Page, or the Create Reservation Page. Based on the way the system has been designed to process since that time, it does not seem to make sense to be able to choose anything other than the Action Items page as a user's start page. The profile build team suggests removing the option to allow a user to choose their start page from the user profile.

07-07-00 - Brad Reel: Feedback from the technical team and the business suggests that it may make more sense to have Create Reservation as an option, and have it process in a different manner than the normal create reservation process. The main advantage of this would be First Notice of Loss Adjsuters. There was also consensus that if the ability to slect your start page is removed in this release, it should be possible to easily add it back in the future.

07-07-00 - Brad Reel: Upon speaking to the database and build teams, it should not be difficult to add the functionality back to the system in a future release. A user's start page was set up as an attribute of a user, and since there will still be other attributes for a user, the start page will just be a new attribute when it is added back. Therefore adding the ability to choose a start page in a future release should not be difficult.

07-07-00 - Brad Reel: This issue is being assigned to Sean O'Donnell for review of the feasibility and impacts to the create reservation process if a user is allowed to enter the create res page without having entered the intial required fields (i.e. Claim #, Claim Type, Renter Last Name, etc.). This issue should be discussed for resolution at the 07-17 issues meeting and is being assigned to Craig Lalumandier as resolution contact until it is resolved. Upon resolution, this issue may need to be assigned back to Brad Reel so that the decision can be implemented into the user profile.

Status: Closed - Resolved

Resolution: 07/17/00 [Craig L.] - For the initial release, the start page will not be profiled. This feature would not be difficult to add in the future.

Sean O'Donnell 07-11-2000 - I would NOT recommend allowing users to have the create reservation page selected as their 'Start Page' for the following reasons;

- the reason(s) we split the reservation process into two pages to begin with still exist 1) to have the information to perform authorized and unauthorized matches to ensure that the reservation that

is being created does not already exist, 2) to get the 'where needed' information to retreive a location & rates, 3) to get the claim type information up front so that we can build the authorization section of the create reservation page appropriately.

- if we change the process to support 'FNOL' adjusters differently than the 'normal' way of creating a reservation, use of the application will be inconsistent.

Please contact me if there are concerns with these statements.